is-phone for IBM Lotus Notes 8.5/8.0.2 and Sametime 8.5 Plug-In

User Guide for is-phone Plug-In

Note: Before using this information and the product it supports, read the information "Notices" on page 5 and "Release Notes" on page 8.

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1 Legal Notes: is-phone for IBM Lotus Notes/Sametime Plug-In

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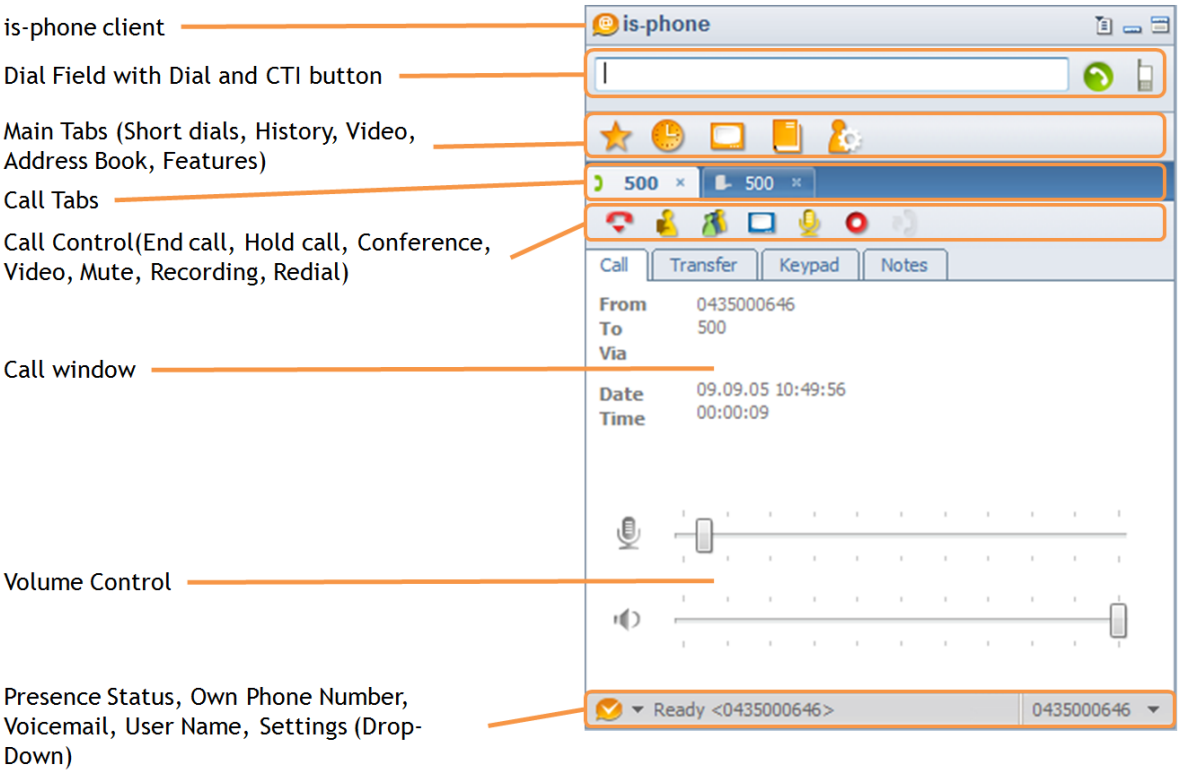
2 Introduction to is-phone for IBM Lotus Notes/Sametime Plug-In

This user manual gives a detailed description of the functions and settings for end-users of the is-phone for IBM Lotus Notes/Sametime Plug-In. You can read the brief description if all you need is a quick overview of the important options. In addition, you can press the F1 key at anytime to call the help function and receive detailed, context-sensitive information on using the individual functions.

You will have no trouble operating is-phone if you are already familiar with Lotus Notes 8 and Sametime.

Please read the Release Notes carefully.

Depending on the specific software release employed for IBM Lotus Notes 8.x and Sametime and the is-phone softphone, the illustrations in this user guide may be slightly different from how they appear on the screen, but the functions will be the same.



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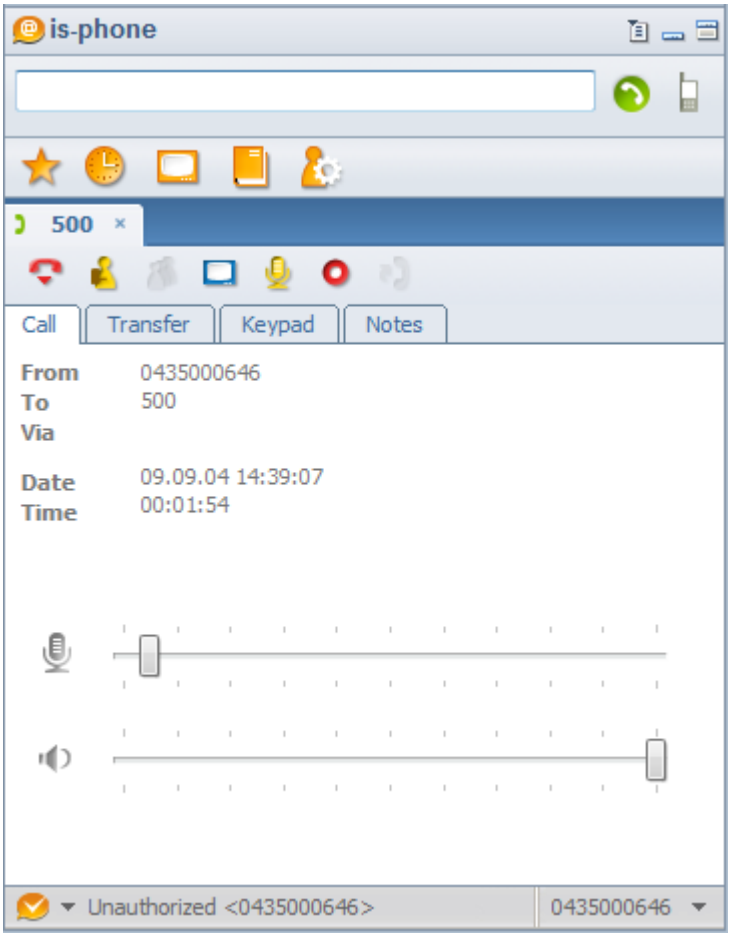
2.1 What is is-phone for IBM Lotus Notes/Sametime Plug-In

is-phone for IBM Lotus Notes/Sametime Plug-In is a softphone solution which is seamlessly integrated as plug-in within IBM Lotus Notes 8.0.2 or higher and Sametime 8.5 and higher with the functionalities of a traditional phone. Moreover there are additional functions available: for example CTI, video and direct access to any Lotus Notes contacts and Lotus Sametime buddy list. The software is ready for installation on any standard PC workstation and notebook. For superior voice quality, we recommend to install USB handsets (Polycom etc.) or USB headsets (Plantronics, GN Netcom etc.).



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2.2 System Requirements: PC, IP PBX, VoIP Service Provider

Before you start to install is-phone for IBM Lotus Notes/Sametime Plug-In, you should get the following information of your IP PBX. The local system administrator has all details. Get in touch with your VoIP service provider, if you use a hosted SIP account or hosted IP PBX.

- Phone number or username
- Password
- Registrar
- Realm

is-phone is certified or tested with all major IP PBX suppliers incl. 3Com (VCX platform certified), Alcatel-Lucent (OmniPCX Enterprise tested), Avaya (SES certified), Cisco (Unified Communications Manager Version 5/6/7 tested), Digim (Asterisk Server tested), Nortel (MCS 1000/2000 certified), ObjectWorld (tested), OpenSER (OpenSIPS Server tested), Siemens (HiPath 2000/3000/4000/8000 certified). Please email to info@iscoord.com if the PBX or VoIP service you are using is not providing full functionality with is-phone.

There are also hard- and software requirements to run is-phone:

- PC workstation or notebook with Intel Pentium 4 or compatible processor
- Memory 1 GB
- Hard disk 30 MB free space
- Operating system Microsoft XP (SP2), Microsoft Vista (SP1) Home Basic, Home Premium, Business, Enterprise, Ultimate
  or
  Linux Ubuntu 9.04
  or
  Mac OS X
- **Lotus Notes 8.0.2 or higher**
  or
  Sametime 8.5 or higher
- IP network connection
- USB interface for using handsets or headsets
- Video camera (optional)

is-phone for IBM Lotus Notes/Sametime Plug-In requires a speaker and a microphone for placing and accepting calls. Some PC workstations and notebooks have built in both. You can use them but the audio quality is often fairly bad. Therefore we recommend to work with an USB handset or headset.

Calls made with is-phone for IBM Lotus Notes/Sametime Plug-In will work without a video camera, but a camera is necessary for sending real-time video to remote parties. is-phone supports most standard USB video cams.

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3 Prepartion & Installation of the is-phone for IBM Lotus Notes/Sametime Plug-In

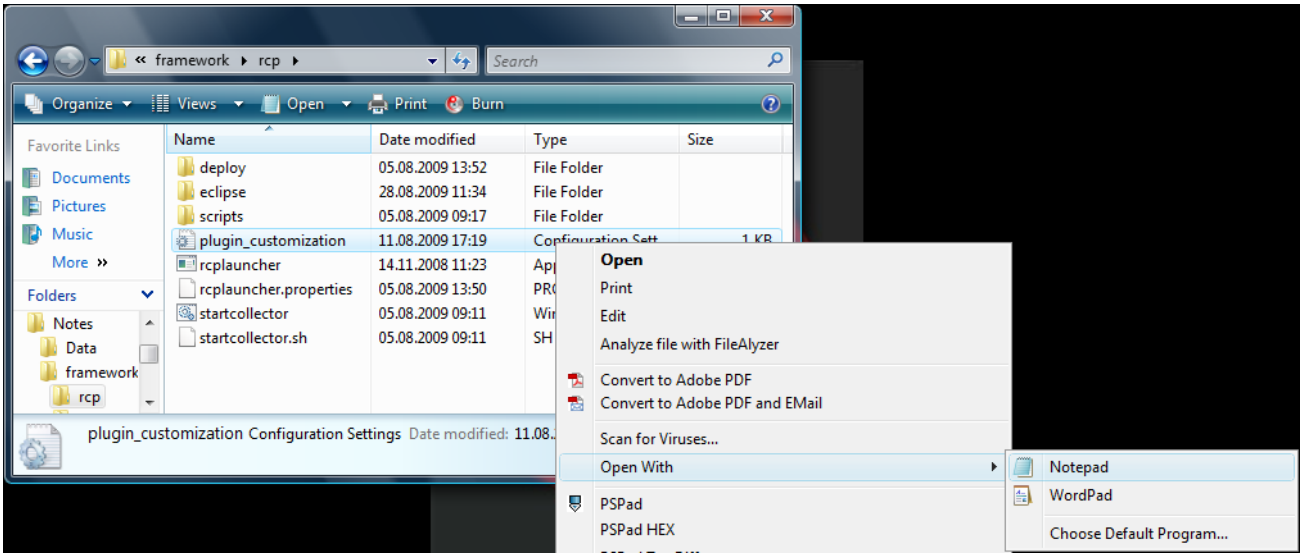
3.1 Preparation

IMPORTANT NOTE: You need to change the plugin_customization.ini file of your Lotus Notes or Sametime installation before you start the sidebar plug-in installation.

ATTENTION: If you are in a Notes/Domino 8 infrastructure, and your client gets desktop settings via policies from a Domino 8 server, watch out for this desktop setting:
Desktop settings -- Basics -- Provisioning -- Allow User initiated updates

This setting need to be set to true – otherwise you are not allowed to install the plug-in.

- Quit Lotus Notes or Sametime client
- Open the file plugin customization.ini with notepad (or another text editor). Normally, this file is located in C:\Program Files\Lotus\Notes\framework\rcp (or e.g. C:\Program Files\IBM\Lotus\Notes\framework\rcp). If you can't find it in these directories, please make a search on customization.ini to find the file on your hard disk.



- Add following line at the end of the plugin_customization.ini:
  com.ibm.notes.branding/enable.update.ui=true

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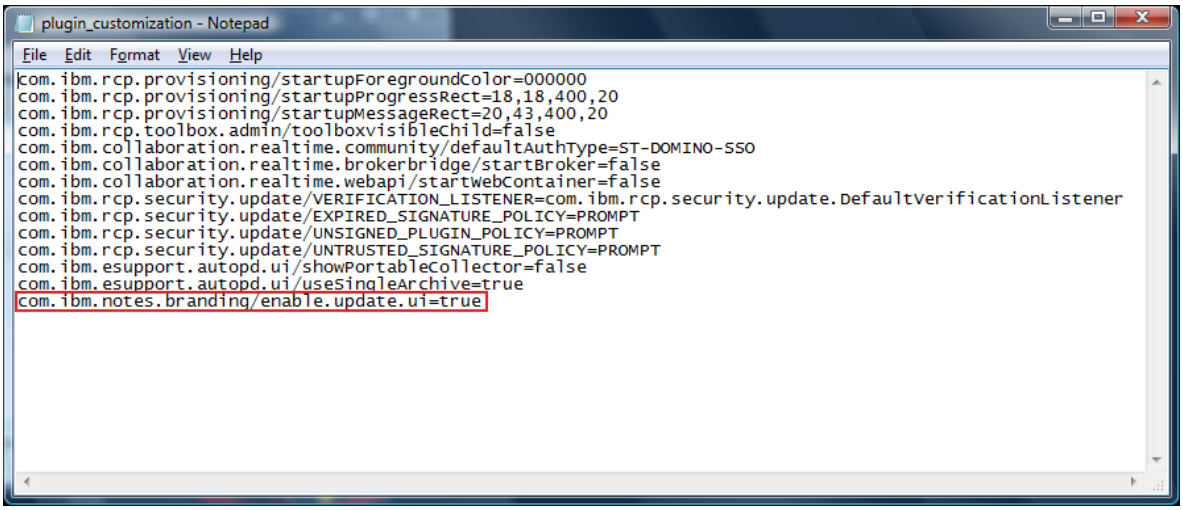
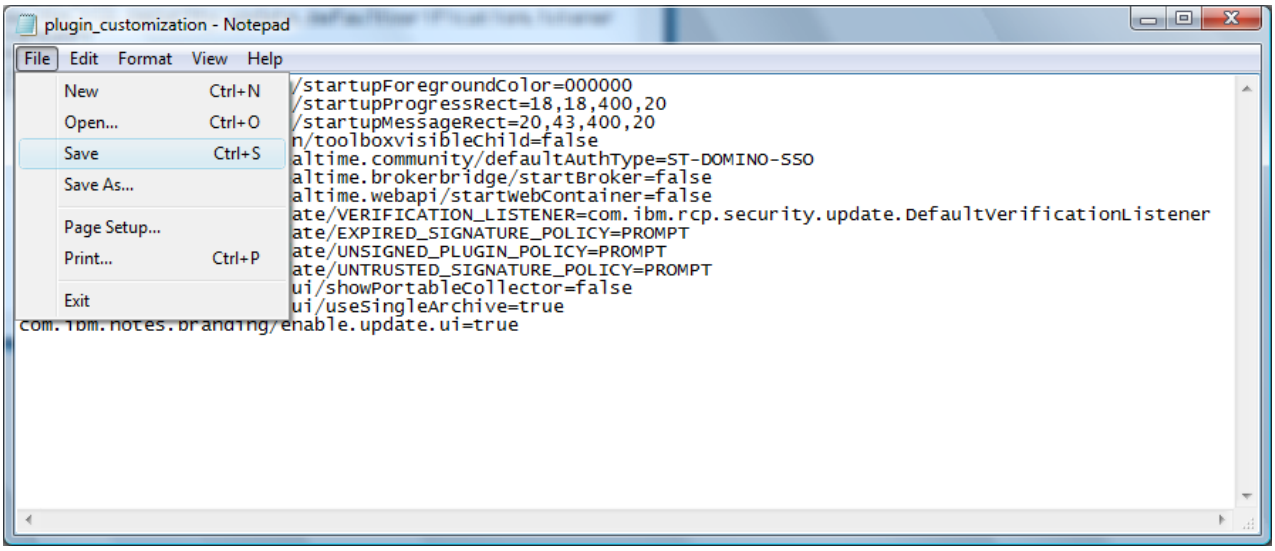


- Save the File.



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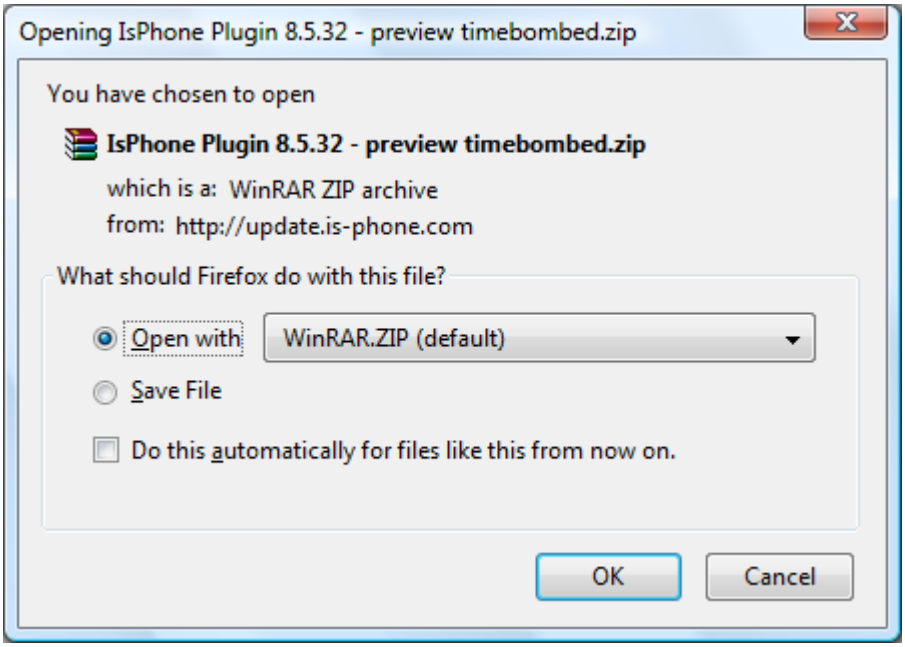
3.2 Download

Download the .zip package and extract it to your local hard drive (e.g. to your Desktop like in the following example).

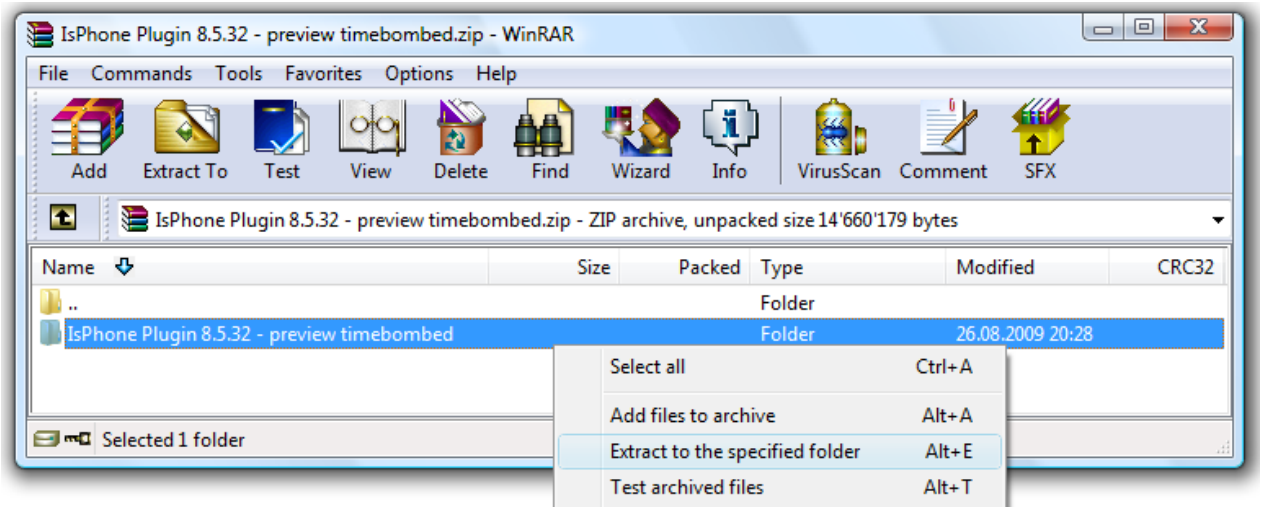
Note: The name of the .zip file can be different from the one shown in the screenshots.

- Open the ZIP file e.g. with WinRAR or another program that is able to unzip .zip files. You can also save the file first and then open the .zip file.


Opening IsPhone Plugin 8.5.32 - preview timebombed.zip
You have chosen to open
IsPhone Plugin 8.5.32 - preview timebombed.zip
which is a: WinRAR ZIP archive
from: http://update.is-phone.com
What should Firefox do with this file?
Open with
WinRAR.ZIP (default)
Save File
Do this automatically for files like this from now on.
OK
Cancel

- Click *OK*

- Extract the files to a folder (e.g. your Desktop)


IsPhone Plugin 8.5.32 - preview timebombed.zip - WinRAR
File Commands Tools Favorites Options Help
Add Extract To Test View Delete Find Wizard Info VirusScan Comment SFX
IsPhone Plugin 8.5.32 - preview timebombed.zip - ZIP archive, unpacked size 14'660'179 bytes
Name Size Packed Type Modified CRC32
.. Folder
IsPhone Plugin 8.5.32 - preview timebombed Folder 26.08.2009 20:28
Select all Ctrl+A
Add files to archive Alt+A
Extract to the specified folder Alt+E
Test archived files Alt+T
Selected 1 folder

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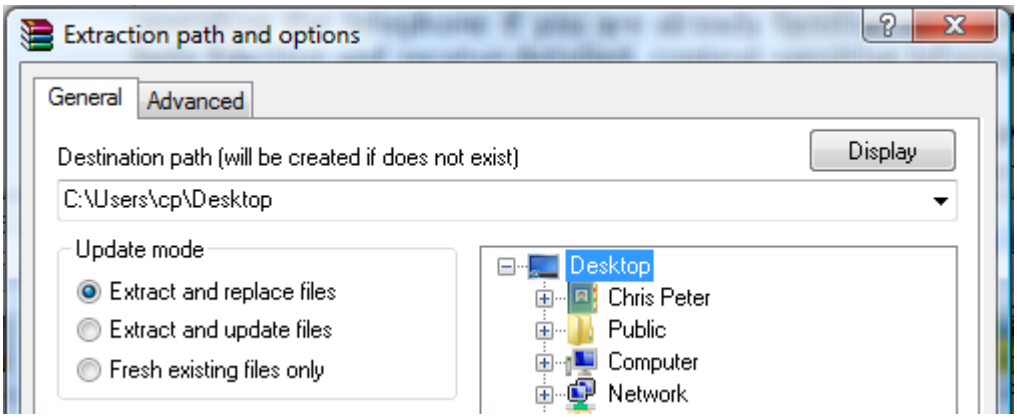

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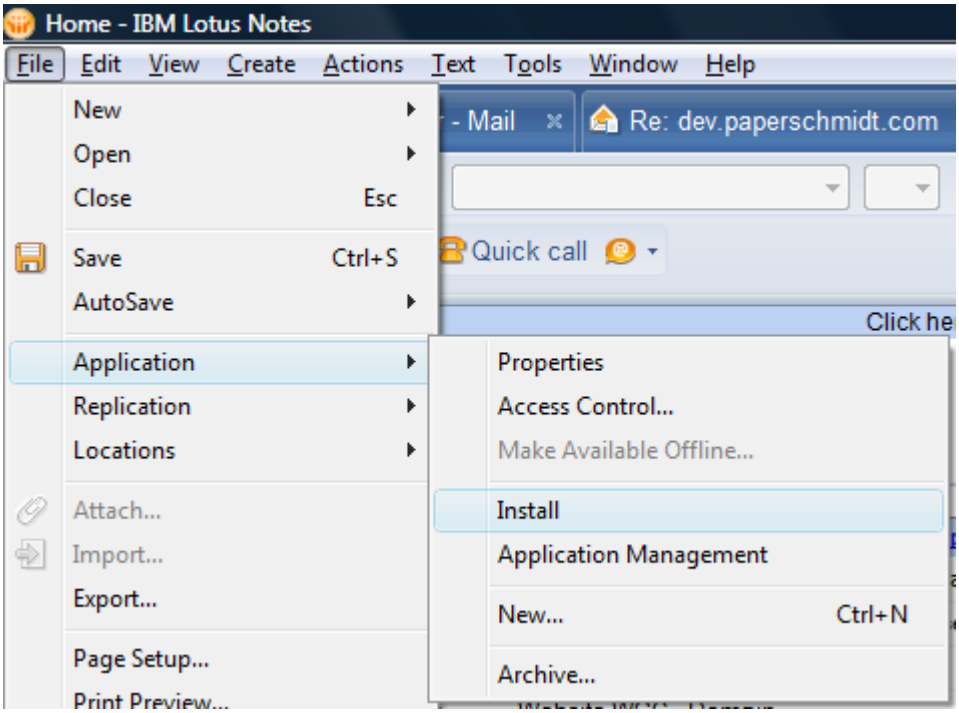
3.3 Installation

Note: To install the is-phone plug-in for IBM Lotus Notes/Sametime, **you need local administrator rights**.

The is-phone plug-in can be installed via the Notes or Sametime plug-in installation function.

- Start your Notes or Sametime client
- Go to File – Application - Install

Note: If you don't have this menu, then you made a mistake in the plugin_customization.ini file (see Chapter "Preparation").



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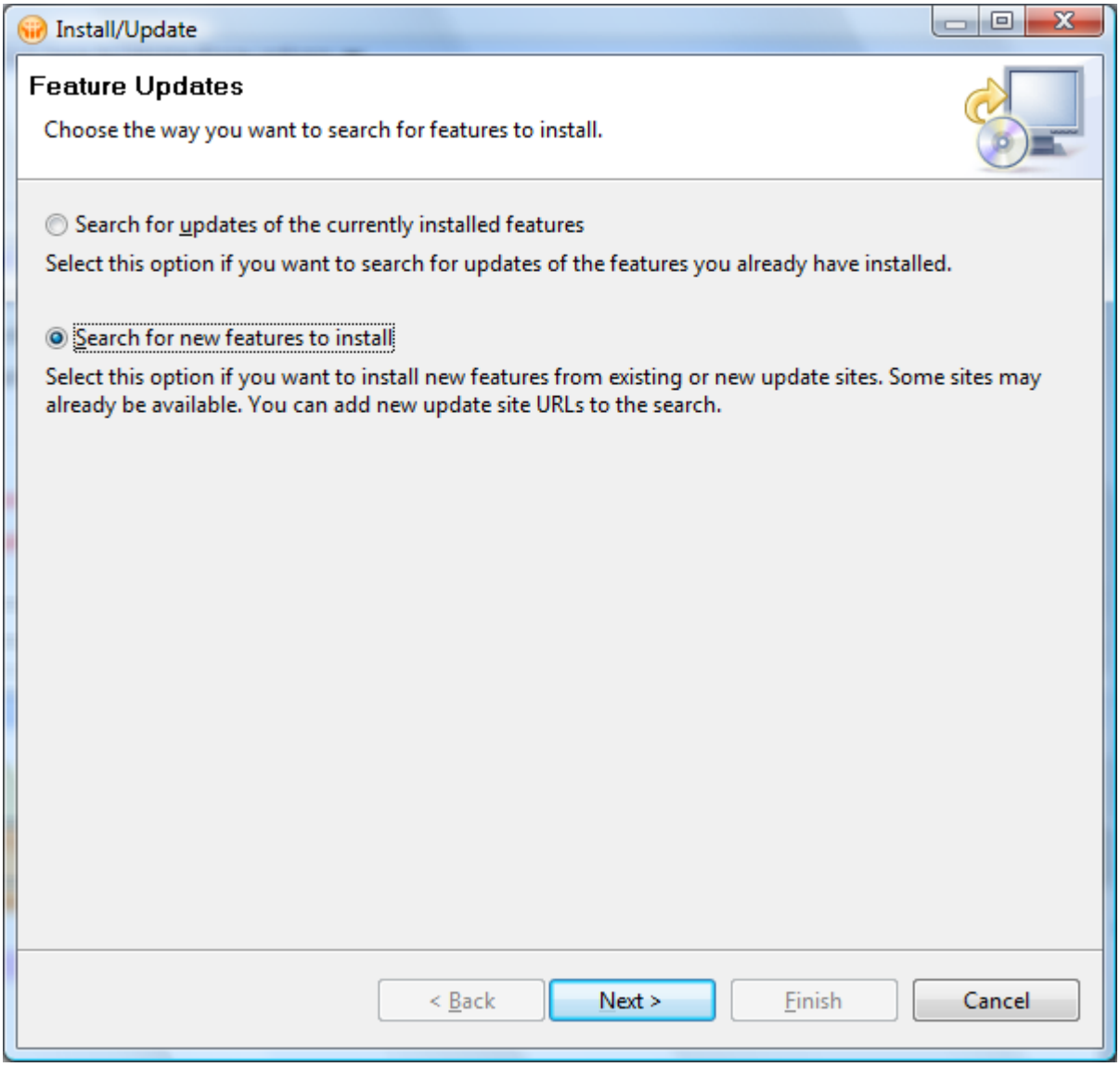
- Select *Search for new features to install*


Install/Update
Feature Updates
Choose the way you want to search for features to install.
Search for updates of the currently installed features
Select this option if you want to search for updates of the features you already have installed.
Search for new features to install
Select this option if you want to install new features from existing or new update sites. Some sites may already be available. You can add new update site URLs to the search.
< Back
Next >
Finish
Cancel

- Click *Next*

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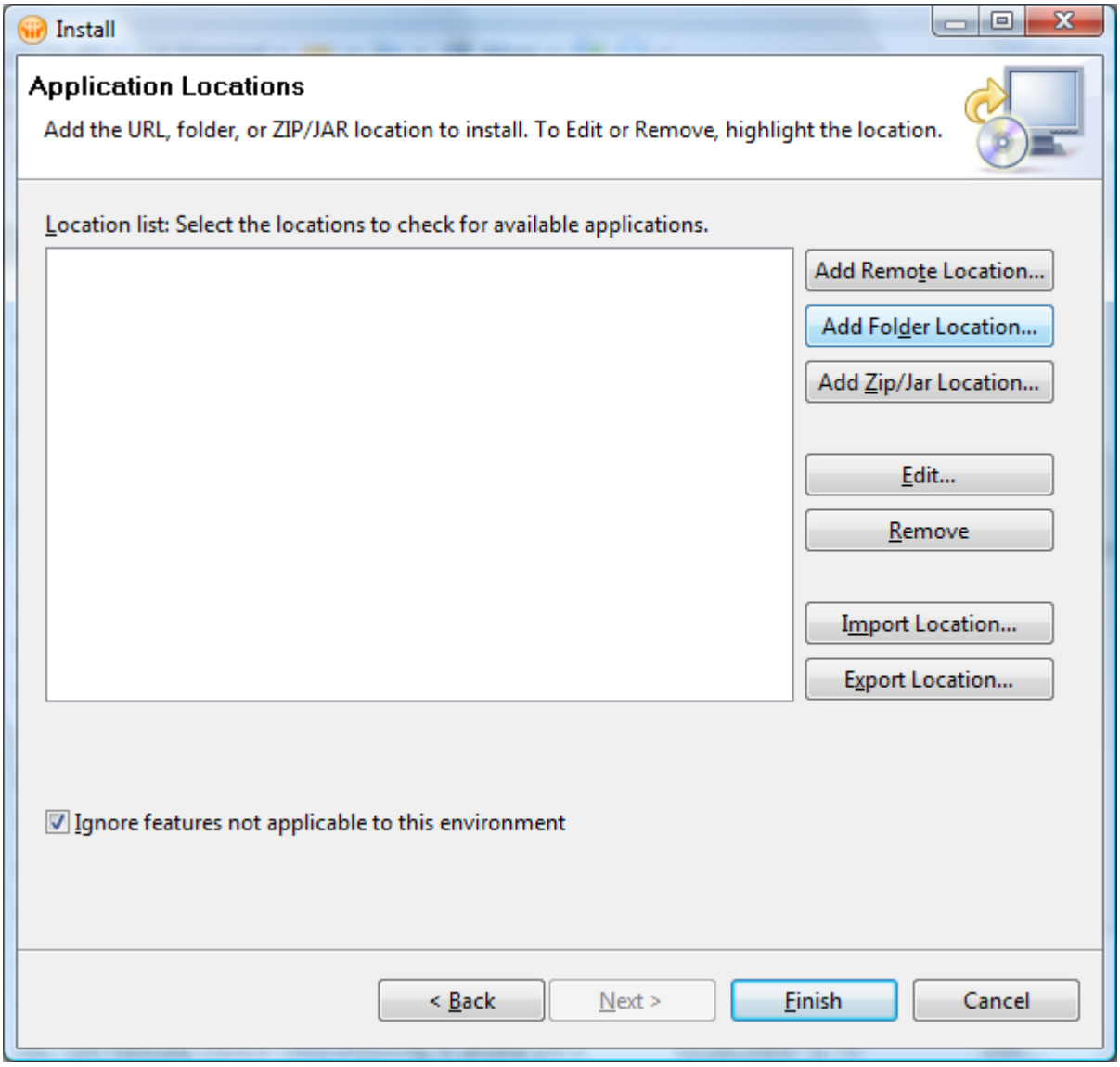
- Click *Add Folder Location*



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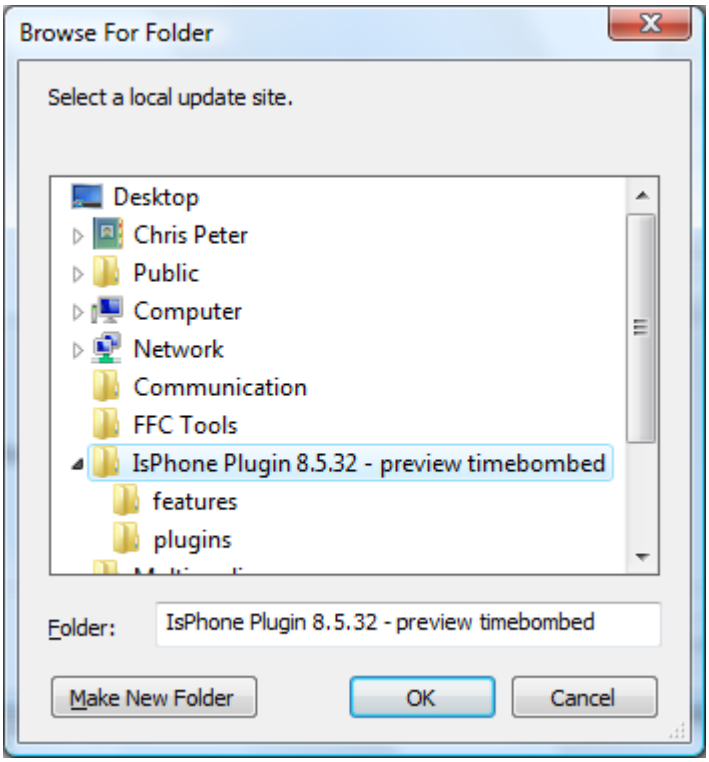
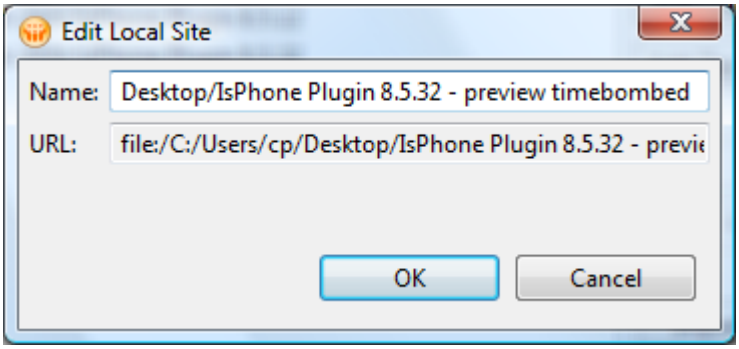
- Browse to the *IsPhone Plugin 8.x - preview timebomed* folder of the unzipped is-phone plug-in package and select it (in our example, the folder was unzipped to the Desktop).



- Click *OK*
- Give the Local Site a Name (e.g. Desktop/IsPhone Plugin 8.x - preview timebombed)



- Click *OK*

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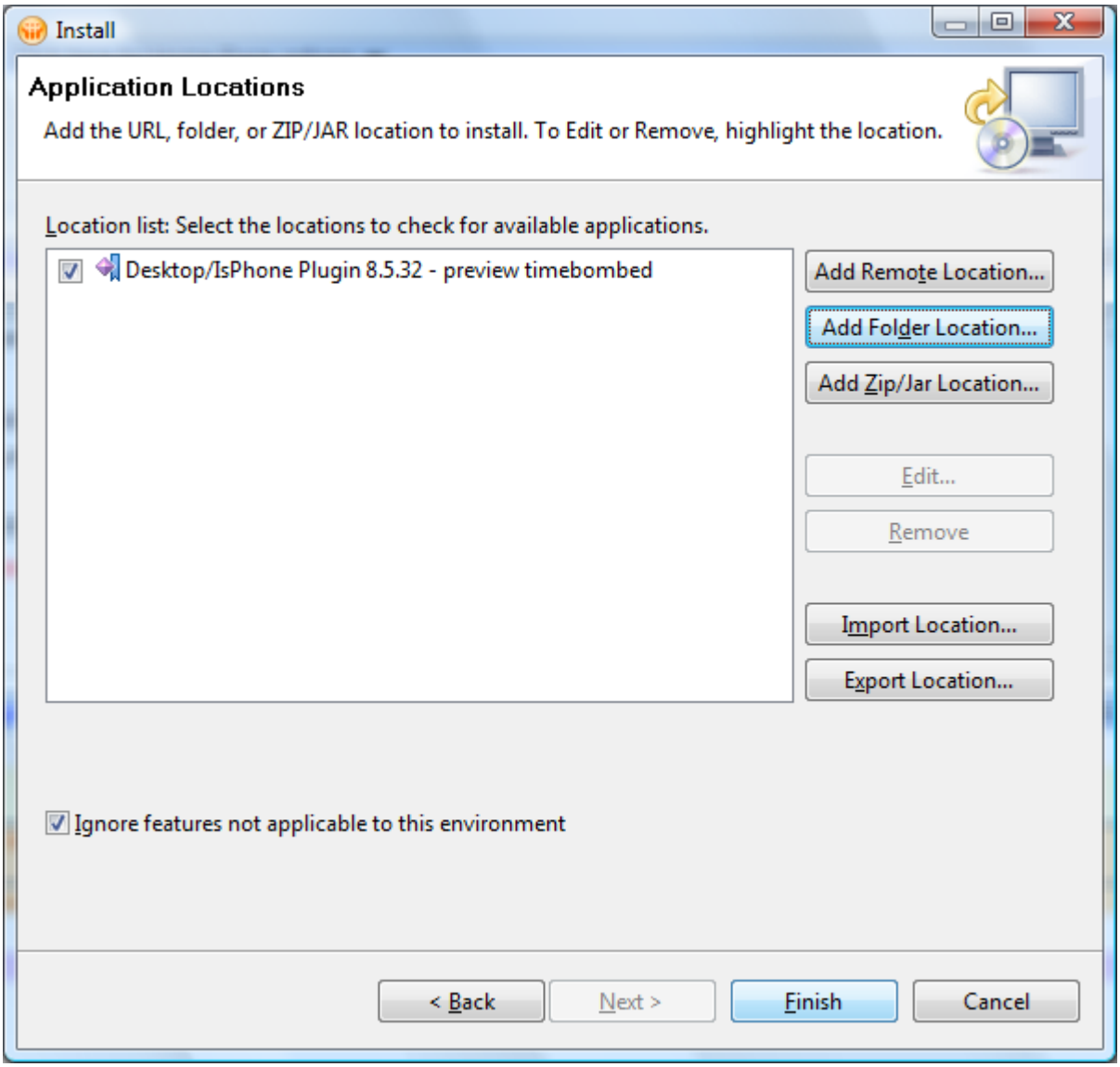

- Click *Finish*

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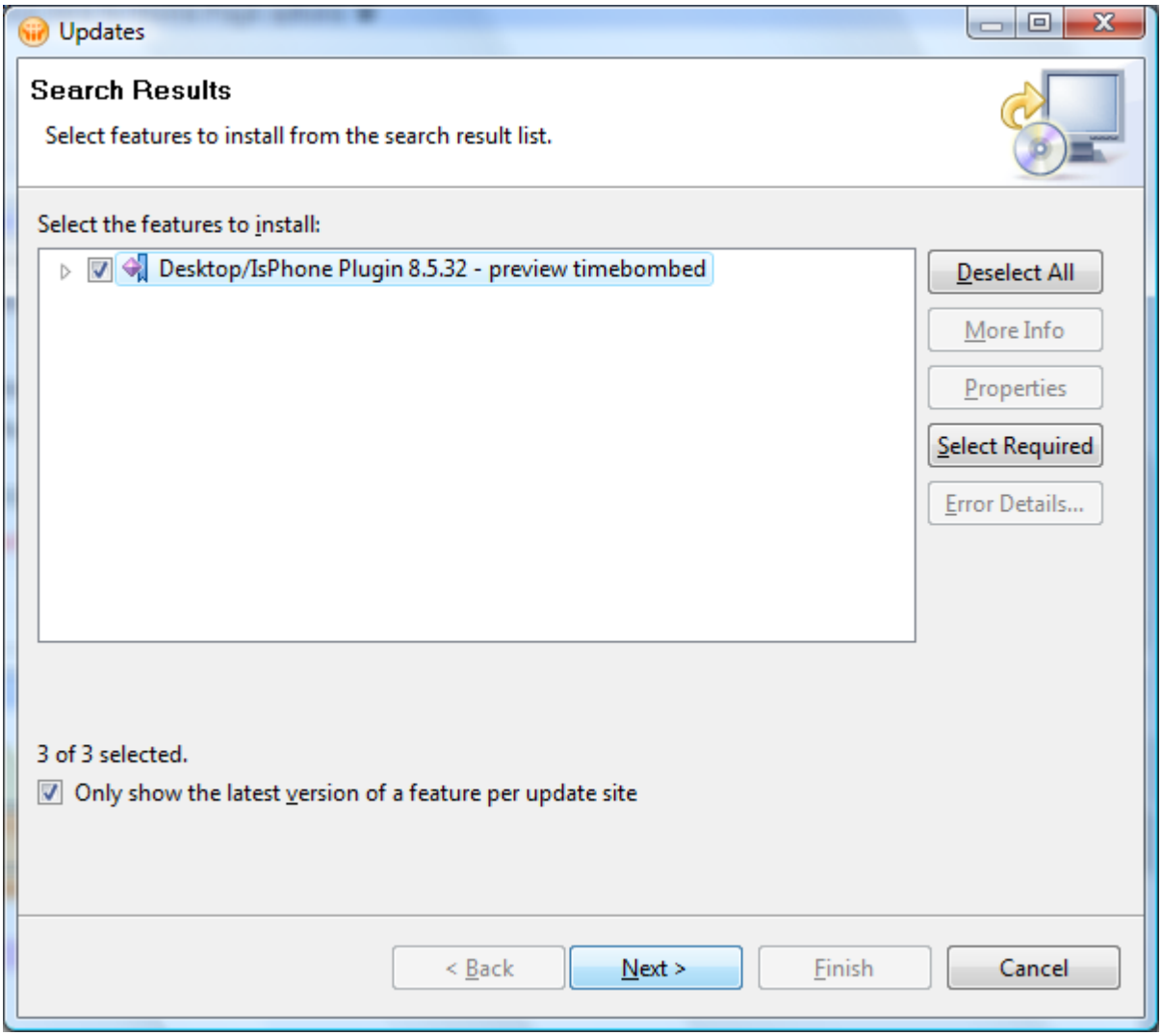

- Click *Next*

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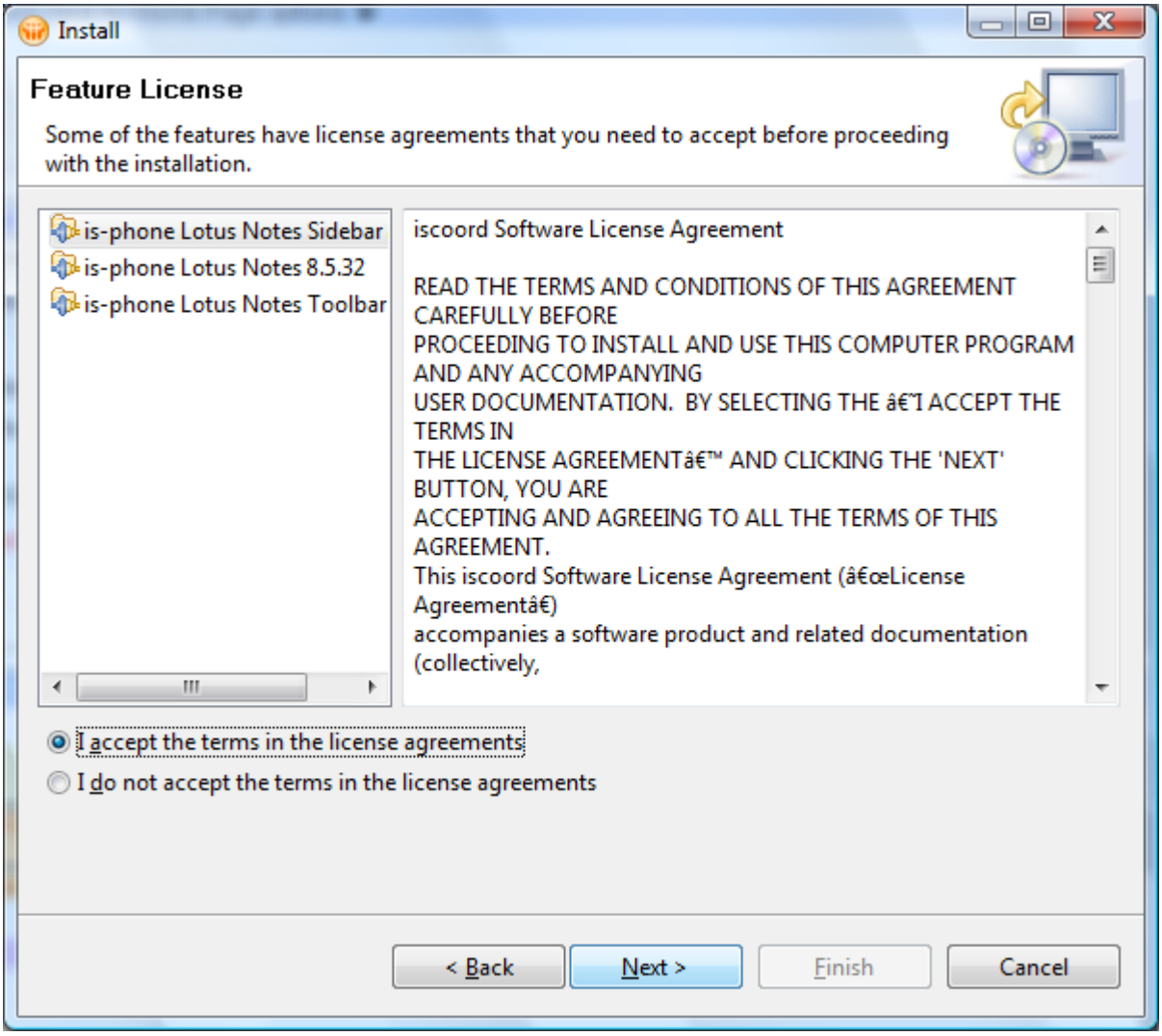
- Accept the terms in the license agreement if you agree to the terms


Install
Feature License
Some of the features have license agreements that you need to accept before proceeding with the installation.
is-phone Lotus Notes Sidebar
is-phone Lotus Notes 8.5.32
is-phone Lotus Notes Toolbar
iscoord Software License Agreement
READ THE TERMS AND CONDITIONS OF THIS AGREEMENT CAREFULLY BEFORE
PROCEEDING TO INSTALL AND USE THIS COMPUTER PROGRAM AND ANY ACCOMPANYING
USER DOCUMENTATION. BY SELECTING THE â€˜I ACCEPT THE TERMS IN
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I accept the terms in the license agreements
I do not accept the terms in the license agreements
< Back
Next >
Finish
Cancel

- Click *Next*

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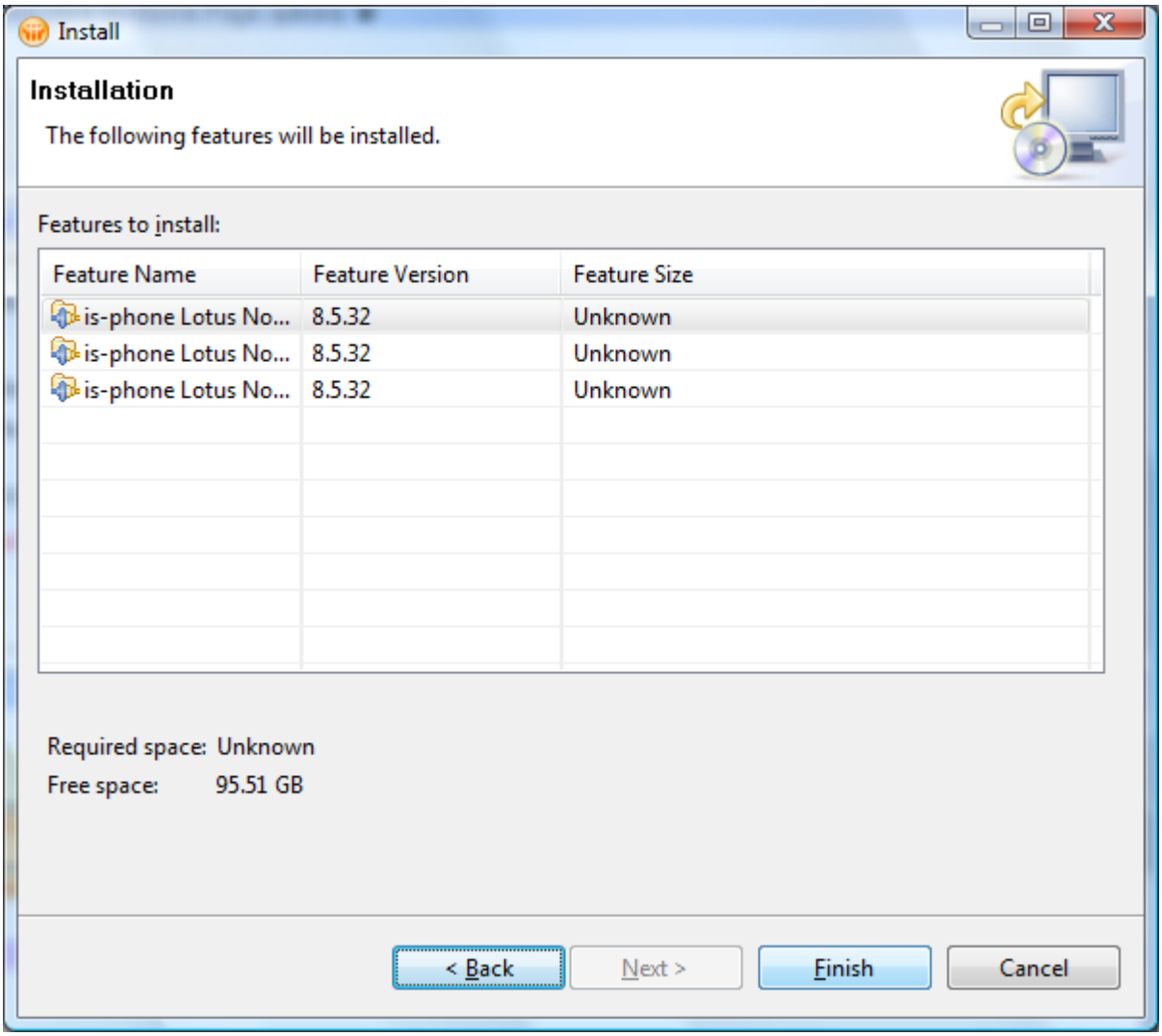

- Click *Finish*

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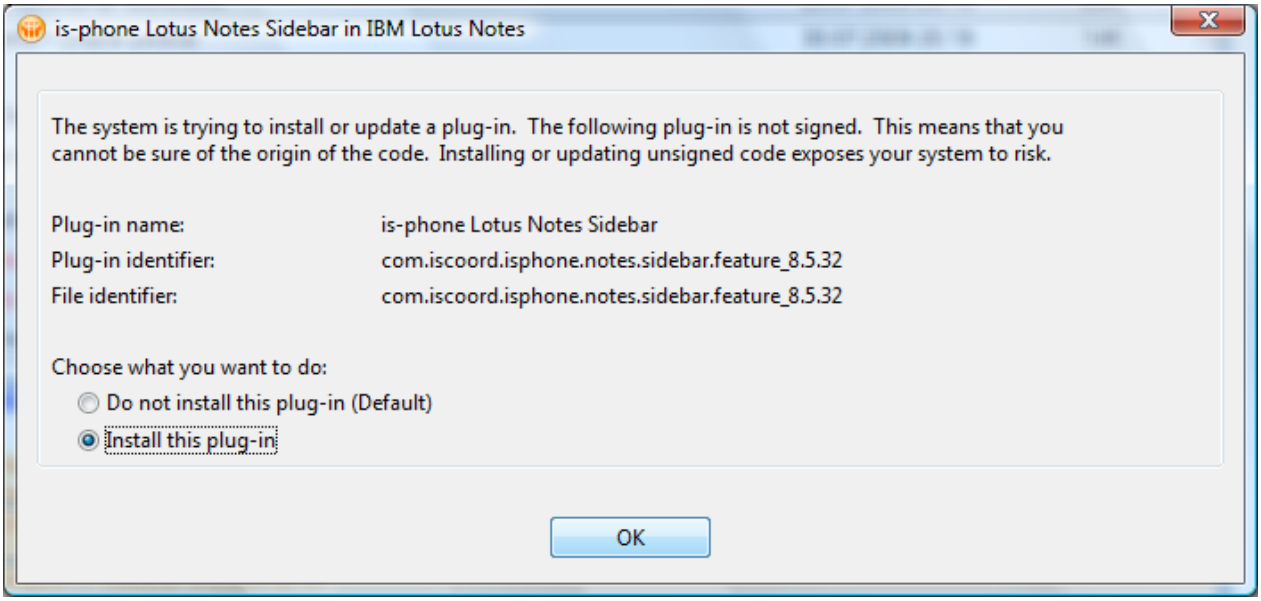
- Select "Install this plug-in"


is-phone Lotus Notes Sidebar in IBM Lotus Notes
The system is trying to install or update a plug-in. The following plug-in is not signed. This means that you cannot be sure of the origin of the code. Installing or updating unsigned code exposes your system to risk.
Plug-in name: is-phone Lotus Notes Sidebar
Plug-in identifier: com.iscoord.isphone.notes.sidebar.feature_8.5.32
File identifier: com.iscoord.isphone.notes.sidebar.feature_8.5.32
Choose what you want to do:
Do not install this plug-in (Default)
Install this plug-in
OK

- Click *OK* to install the is-phone Lotus Notes Sidebar

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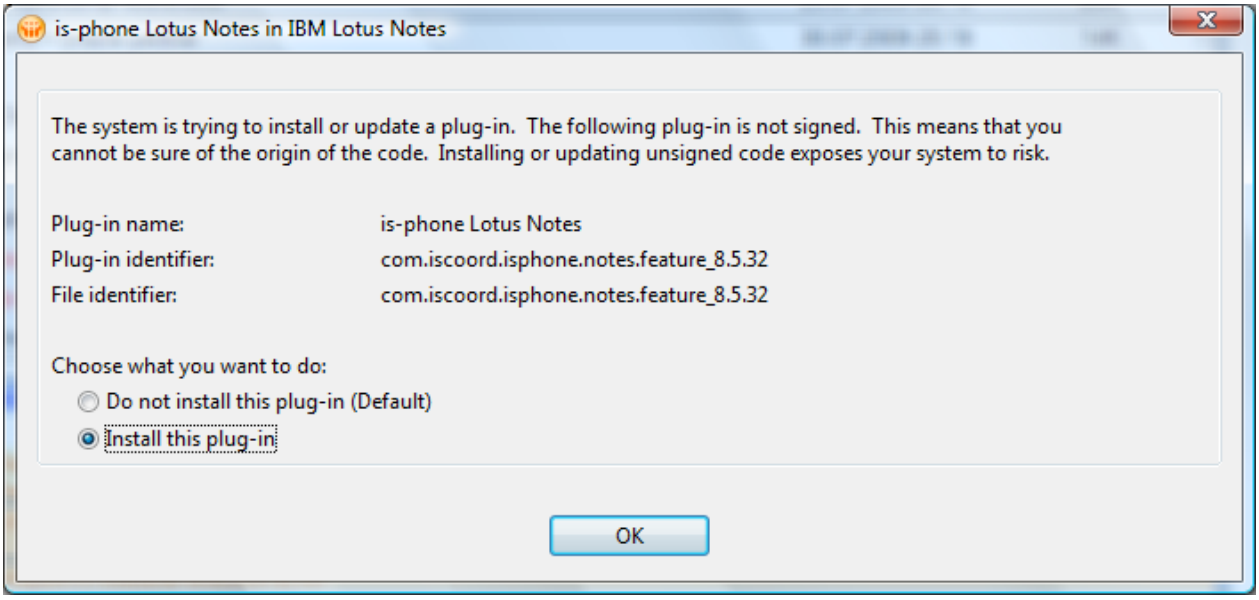
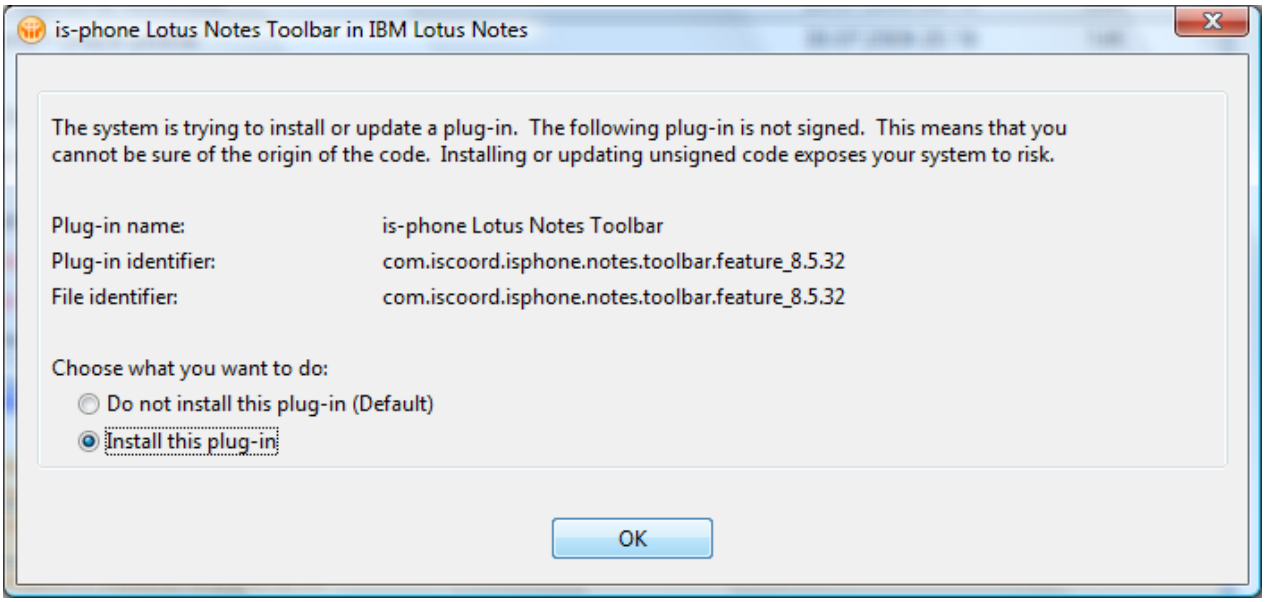
- Select "Install this plug-in"


is-phone Lotus Notes in IBM Lotus Notes
The system is trying to install or update a plug-in. The following plug-in is not signed. This means that you cannot be sure of the origin of the code. Installing or updating unsigned code exposes your system to risk.
Plug-in name: is-phone Lotus Notes
Plug-in identifier: com.iscoord.isphone.notes.feature_8.5.32
File identifier: com.iscoord.isphone.notes.feature_8.5.32
Choose what you want to do:
Do not install this plug-in (Default)
Install this plug-in
OK

- Click *OK* to install is-phone Lotus Notes
- Select "Install this plug-in"


is-phone Lotus Notes Toolbar in IBM Lotus Notes
The system is trying to install or update a plug-in. The following plug-in is not signed. This means that you cannot be sure of the origin of the code. Installing or updating unsigned code exposes your system to risk.
Plug-in name: is-phone Lotus Notes Toolbar
Plug-in identifier: com.iscoord.isphone.notes.toolbar.feature_8.5.32
File identifier: com.iscoord.isphone.notes.toolbar.feature_8.5.32
Choose what you want to do:
Do not install this plug-in (Default)
Install this plug-in
OK

- Click *OK* to install the is-phone Lotus Notes Toolbar

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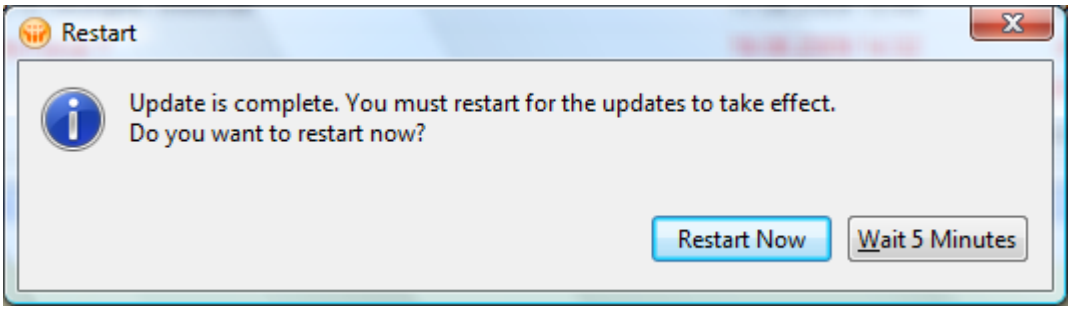
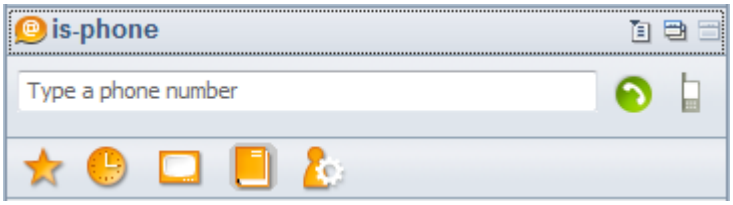

Restart
Update is complete. You must restart for the updates to take effect.
Do you want to restart now?
Restart Now
Wait 5 Minutes

- Restart Lotus Notes by clicking on "Restart Now"

After restarting Lotus Notes, you will see the is-phone Plug-In on the right side

You can maximize the plug-in by clicking on the "Maximize" icon:



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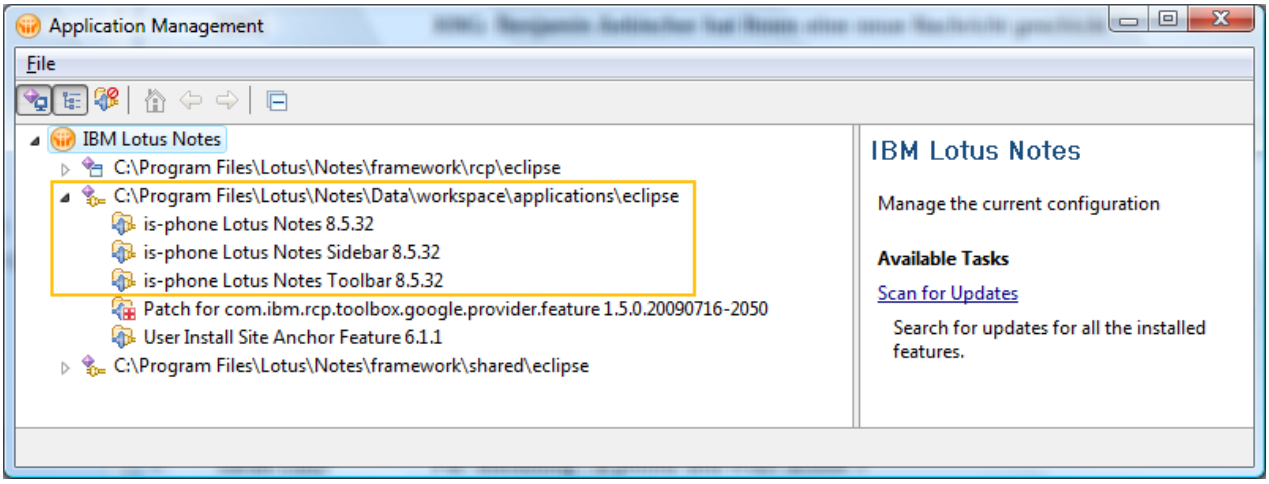
3.4 Uninstalling the is-phone for IBM Lotus Notes/Sametime Plug-In

You can uninstall the is-phone for IBM Lotus Notes/Sametime Plug-In by using the uninstallation feature within IBM Lotus Notes/Sametime.

The following files are related to the is-phone for IBM Lotus Notes/Sametime Plug-In and can be uninstalled without influence on other programs. They are located in *File -> Application -> Application Management* within IBM Lotus Notes/Sametime.

- is-phone Lotus Notes ...
- is-phone Lotus Notes Sidebar ...
- is-phone Lotus Notes Toolbar ...

IMPORTANT: You need to start the uninstallation with the last is-phone Plug-In (is-phone Lotus Notes Toolbar 8.x), followed by the second one (is-phone Lotus Notes Sidebar 8.x) and finishing with the first one (is-phone Lotus Notes 8.x).



With a right mouse click you can select *Uninstall* to uninstall the respective is-phone Plug-in.

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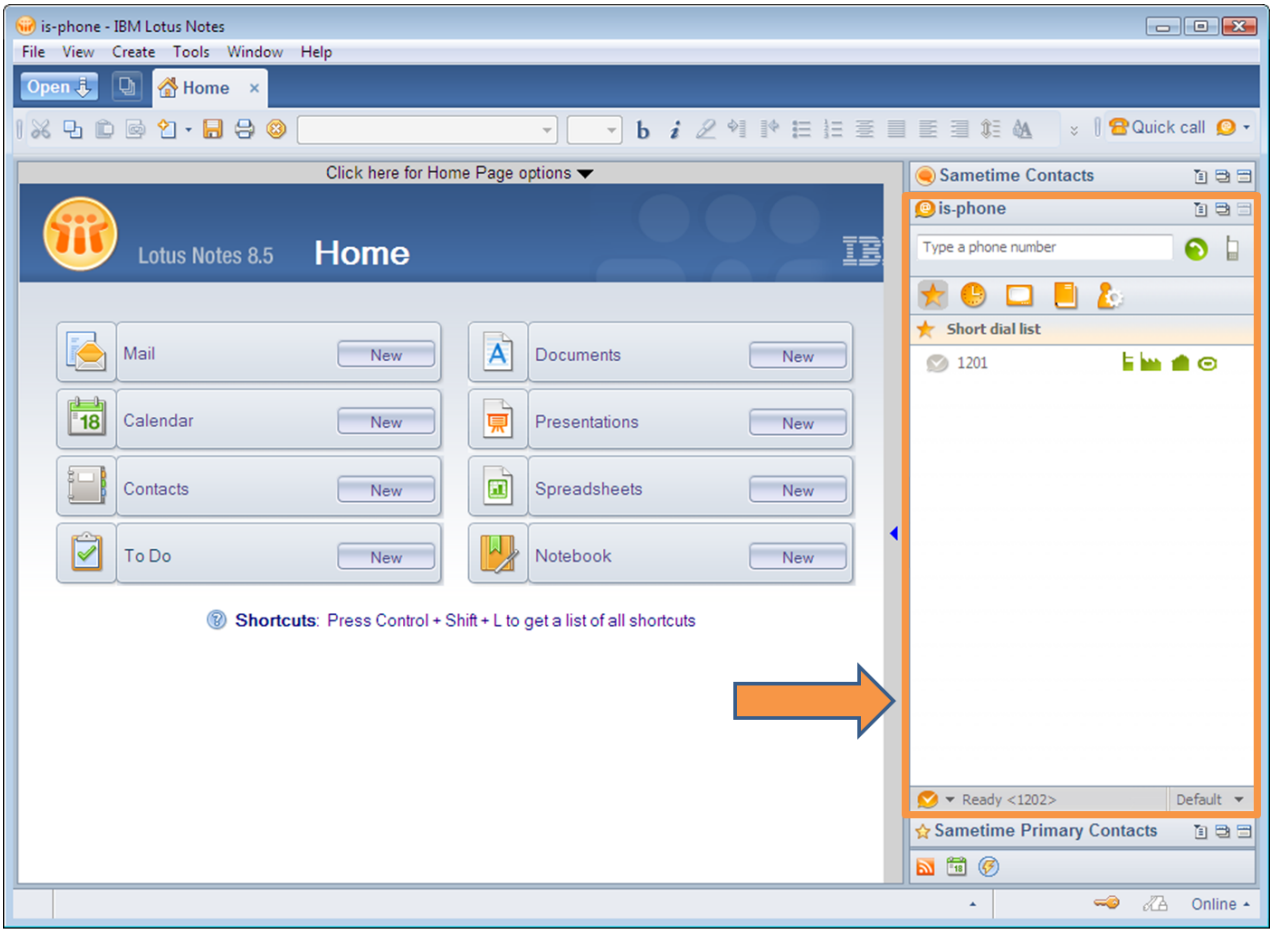
4 Starting the is-phone for IBM Lotus Notes/Sametime Plug-In

You can now start the is-phone for IBM Lotus Notes/Sametime Plug-In by starting IBM Lotus Notes or Sametime.

In Lotus Notes, the is-phone for IBM Lotus Notes Plug-In will be displayed like this:



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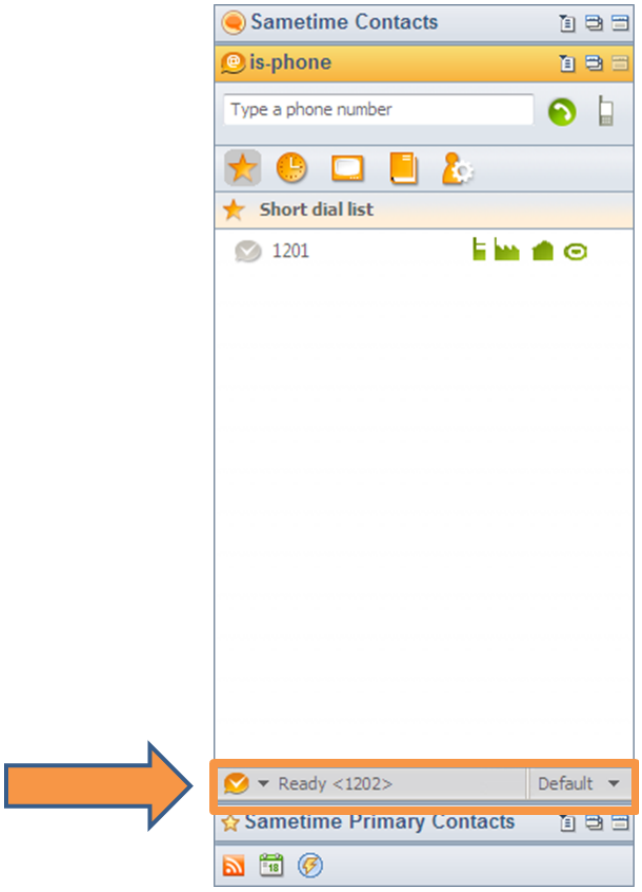
When starting the is-phone for IBM Lotus Notes/Sametime Plug-In, you will normally see the message “Ready” in the status bar in the bottom left-hand corner of the window.

The status bar will provide you with information about the status of your softphone at all times:

- ***Ready:*** your softphone is ready to use
- ***Connecting*** (searching your telephony server)
- ***Registration failed*** (could not access the telephony server): check your preferences or contact your local administrator
- ***Rejected*** (user id/password authentication failed): check your preferences or contact your local administrator
- ***Not connected:*** Registrar not found or invalid license. If the license is not available or invalid, a pop-up window will appear with further information. “This phone does not match your license authorization for extension <your extension>.”



Note: If your is-phone for IBM Lotus Notes/ Sametime Plug-In softphone does not show the “Ready” status, check your account information in the Settings menu (for details see “Configuring the is-phone for IBM Lotus Notes/Sametime Plug-In”, “General Settings”).

Note: In the Settings menu (for details see “Configuring the is-phone for IBM Lotus Notes/ Sametime Plug-In”, “General Settings”) please make sure your password is used and NOT your voicemail password. Please make sure you are using the correct extension to register also, although your local extension may be reachable in the corporate environment by dialing a 5 digit extension such as x41111, this does NOT necessarily mean your user name is 41111. The administrator may have actually setup your extension in the PBX system as your full 10 digit (7 digit number + 3 digit area code) DID, for example: 5084241111.

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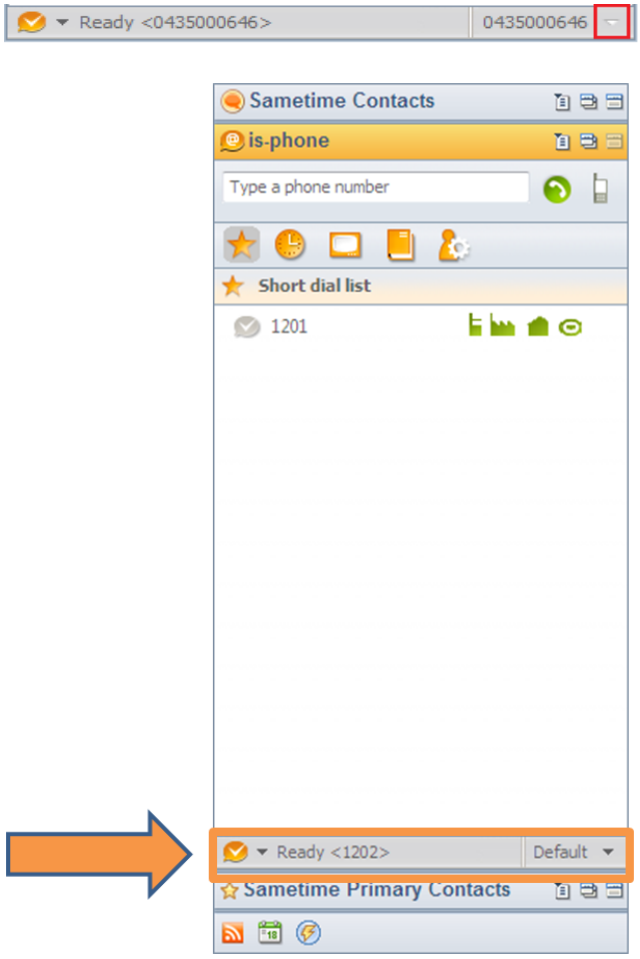
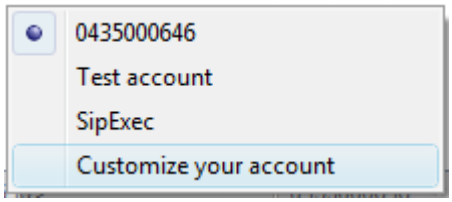
5 Configuring the is-phone for IBM Lotus Notes/Sametime Plug-In

Under the is-phone Settings at the bottom right corner you can configure your is-phone for IBM Lotus Notes/Sametime plug-in.

- Click on the *arrow button* to open the drop-down list



- Select "*Customize your account*"



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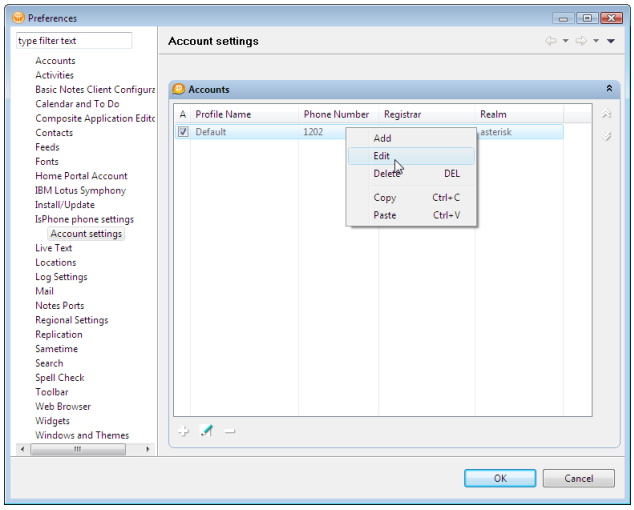
5.1 Account Settings

At first, you should setup / configure the is-phone for IBM Lotus Notes/Sametime Plug-In Account.

When you either *double click* on an account entry or *right click* and select *Edit*, the configuration menu appears where you can change:



- SIP Telephony account information
- General Settings
- Regional specific settings
- Audio / Ringer devices
- Video devices

IMPORTANT: Please go through all configuration settings, otherwise your softphone might not work correctly.

Note: Changes in these settings during a call will be effective after restarting the is-phone for IBM Lotus Notes/Sametime Plug-In.

or

- use the symbols to

add an account

edit the account that is highlighted or

delete the account that is highlighted

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5.1.1 General Settings

IMPORTANT: Most of the following information you will get from your PBX/SIP Proxy Administrator or from your SIP Provider.

For each profile / account, following general settings can be defined:

- *Profile Name:* User definable name
- *Phone Number:* Phone number under which the plug-in will register
- *Username:* Username for proxy/PBX authentication
- *Password:* Password for proxy/PBX authentication
- *Registrar:* TCP/IP Number or DNS name of your registrar
- *Domain:* Enter the Domain (e.g. iscoord.net)
  Note: Normally leave this empty (except for Nortel CS1000 where you have to enter the domain name)
- *Identity:* Enter the SIP identity in SIP Format (e.g. “4444” <sip:4444@iscoord.net> or <sip:4444@iscoord.net>)
  Note: Normally leave this empty – the identity is generated automatically
- *Realm:* Some PBX/Registrar needs a Realm for MD5 authentication
- *Listening Port:* TCP/IP Port number for SIP (normally 5060)
- *Protocol:* Select UDP, TCP or TLS (normally UDP is used)
- *Codecs:* You can change the order of the codecs. The client will then negotiate with the PBX/Proxy the codec
- *DTMF Mode:* Select the supported DTMF Mode (Inbound / RFC 2976)
- *Port Range*: Select a port range that can be used for the RTP packets. If you leave it open, a random port will be used for each phone call
- *Reregister interval:* Reregistration happens in the defined interval – if empty or 0 – no reregistration will be done with the registrar
- *Supported extenstions (SIP):* Turn Prack on / off
- *Send UDP keep alive packets:* Turn this on to send every 2 seconds empty UDP packets. This is sometimes used to keep the session open thru firewalls
- *Enable hold before transfer:* This will automatically put a call to hold before unattended transfer to someone else (blind transfer)
- *Unattended transfer not supported:* With this flag you can disable unattended call transfer

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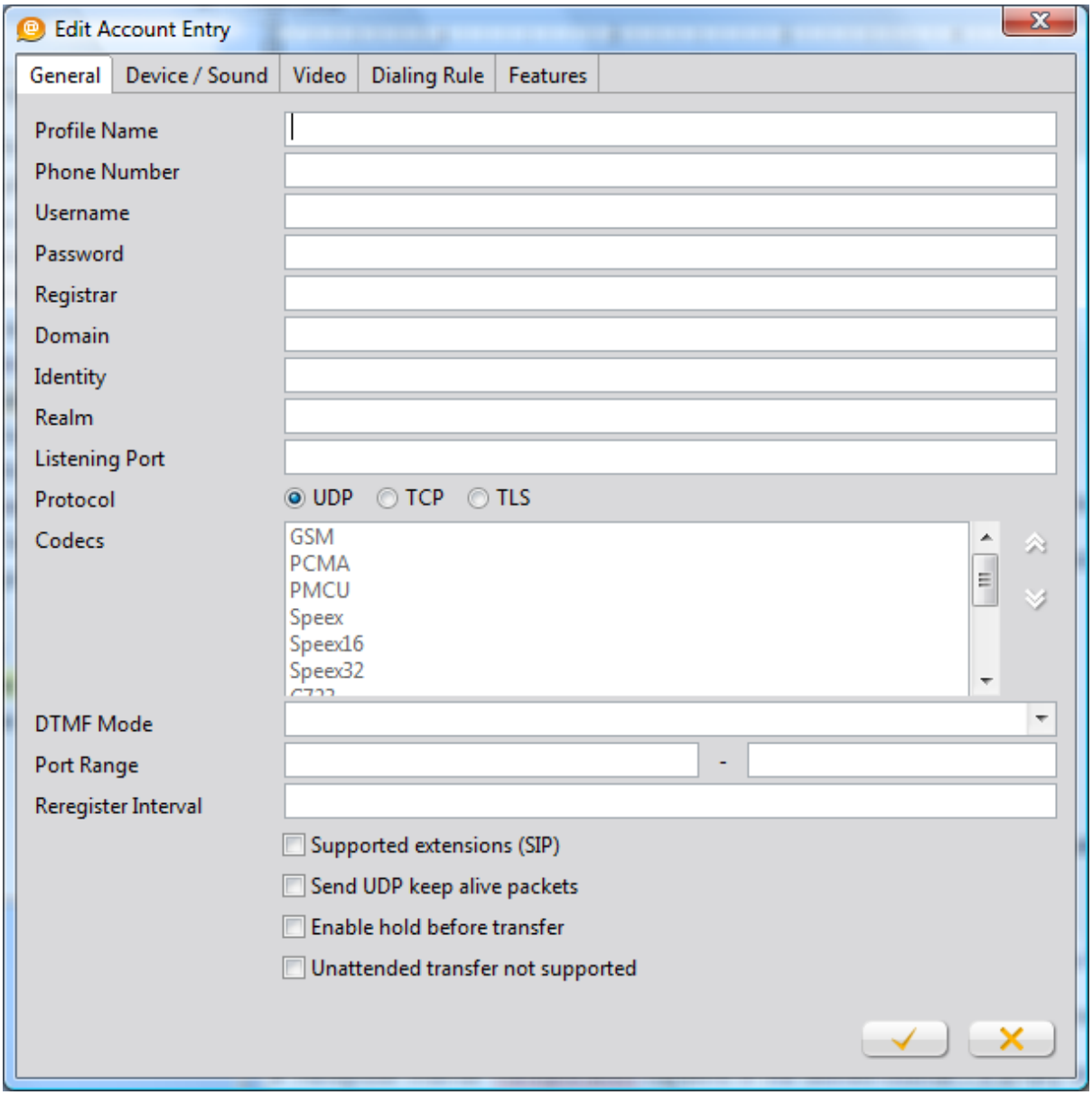

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5.1.2 Device / Sound Settings

IMPORTANT: We recommend to use a professional USB headset or handset. Using the internal sound devices of e.g. your notebook can negatively affect the sound quality (e.g. background noise etc.).

Note: If an audio device is not available (disconnected from the PC/Laptop), then automatically the default device of Windows will be used.

Note: If you change sound settings during a call, they will be set to these settings after the call has ended.

- *Microphone:* Select the device you want to use for talking
- *Microphone volume:* Set the volume of the microphone. This setting will always be used when you start is-phone.
  Note: Depending on the device, the volume of the microphone should be set very low. We recommend that you make a test call to adjust proper setting
- *Speaker:* Select the device you want to use for listening
- *Speaker volume:* Set the volume of the speakers. This setting will alwys be used when you start is-phone.
- *Ringing device:* Select the device you want to use for ringing of incoming internal and external calls
- *Ringing internal (.wav):* Select the wav file that should be played for internal ringing
- *Ringing external (.wav):* Select the wav file that should be played for external ringing
- *Ringing volume:* Set the volume of the ringing sound
- *Signalling:* Select the device you want to use for signaling
- *Signalling (.wav):* Select the wav file that should be played for signalling
- *Signalling volume:* Set the volume of the signalling sound
- *Music on hold (.wav):* Select the wav file that you like to be played when putting a call on hold
- *Enable music on hold:* Flag this box if you like to enable music when a call is on hold
- *Ringing out (.wav):* Select the wav file that should be played when you are dialling out

Icons:

Open explorer to select a file

Play the selected file

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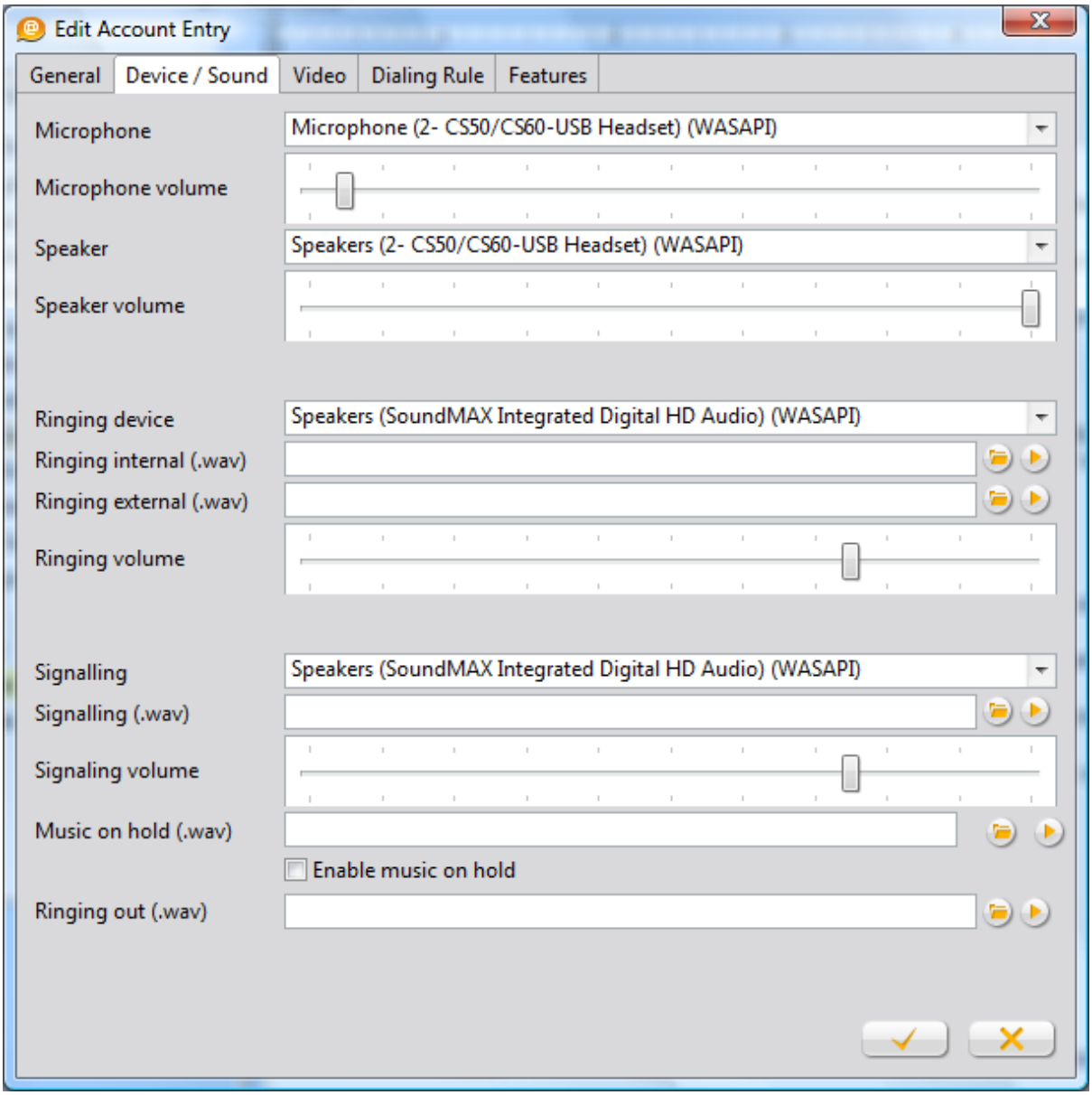

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5.1.3 Video Settings

Note: You can use is-phone also without using video. These settings are not mandatory.

- *Camera device:* Select the device from the drop-down list
  Note: Select "Static picture" if you have no camera device

- *Download bandwidth:* 256 KB (default)

- *Upload bandwidth:* 256 KB (default)

- *Quality:*
  - Fastest: QCIF format
  - Medium: CIF format
  - High: VGA format

- *Codecs:* Leave the default unless your system administrator instructed you to change them

- *Static picture:* You can select a static picture that will be displayed instead of video by clicking on the folder sign
  Note: The picture file should not be bigger than 250kb

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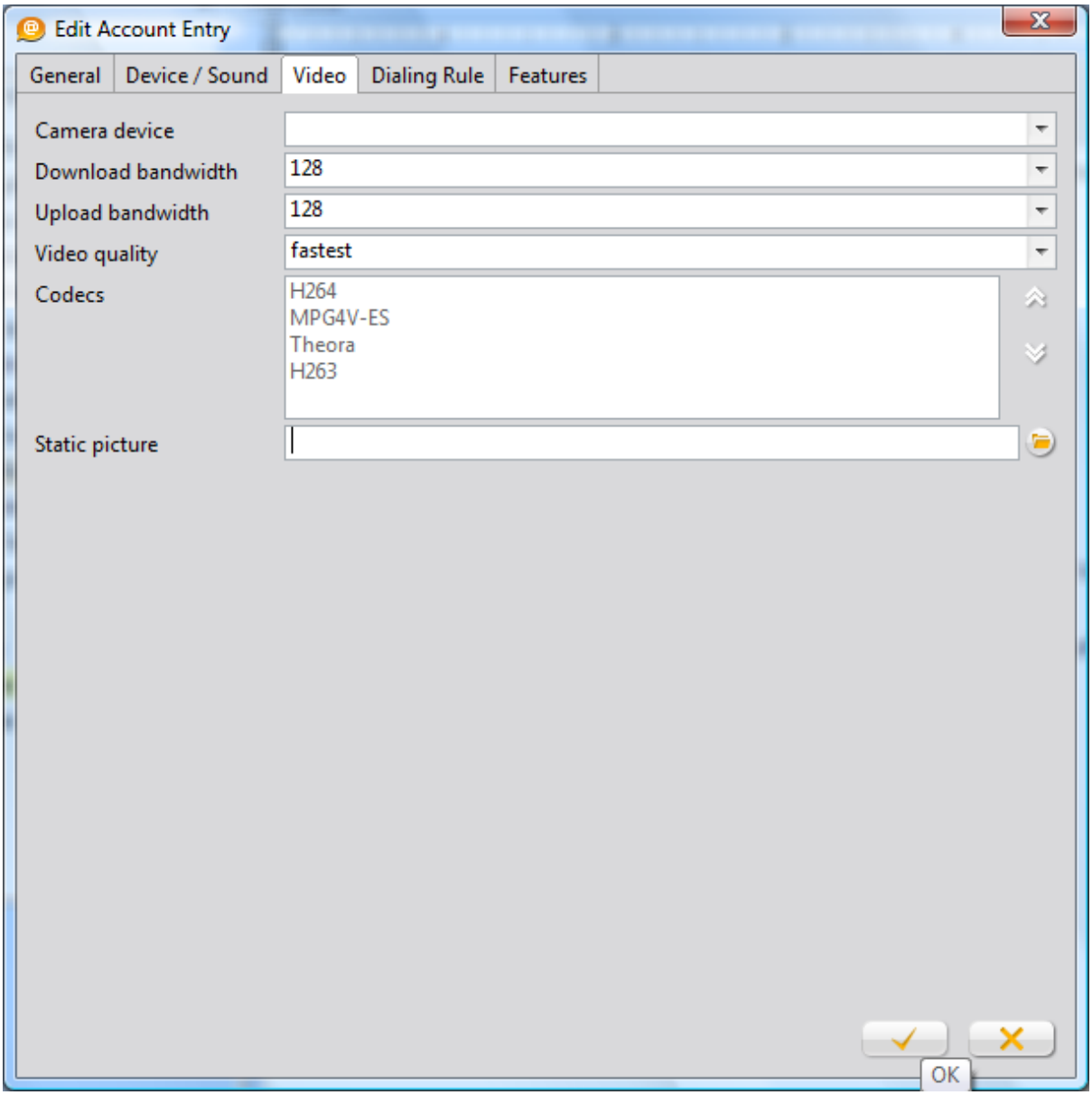

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5.1.4 Dialing Rule Settings

- *Country code:* International prefix for your country (without leading 0)
- *Area code:* Enter your area code (without leading 0)
- *Outbound line:* Enter the prefix to get an outbound line (e.g. 0)
- *Long Distance:* Enter the prefix for long distance calls
- *International:* Enter the prefix for international calls
- *Internal Phone Range:* Enter the internal phone number ranges (this is used for signaling/ringing). You can add, edit or delete international phone ranges by using the following symbols

add an international phone range

edit an international phone range or

delete an international phone range

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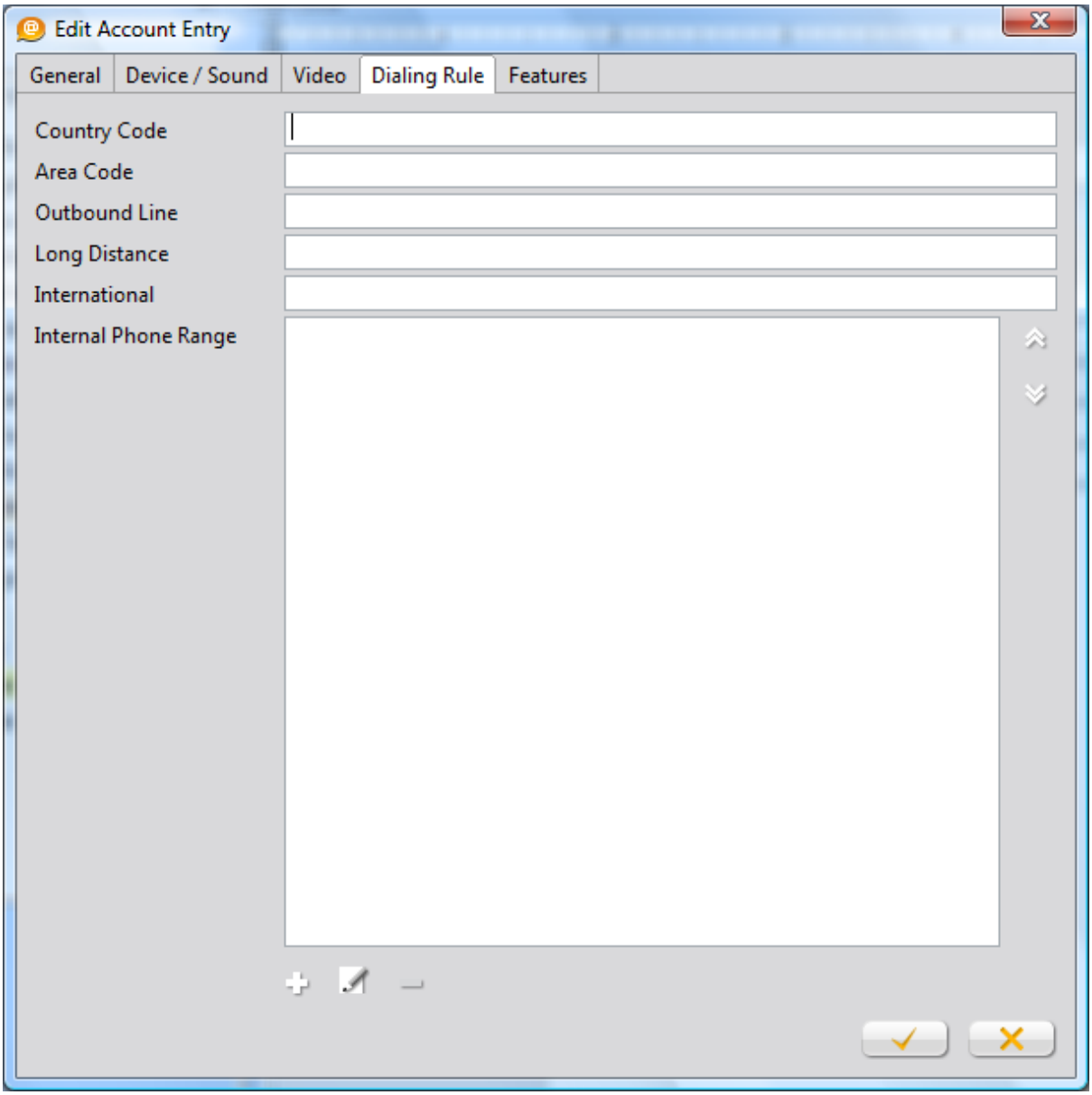

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5.1.5 Features Settings

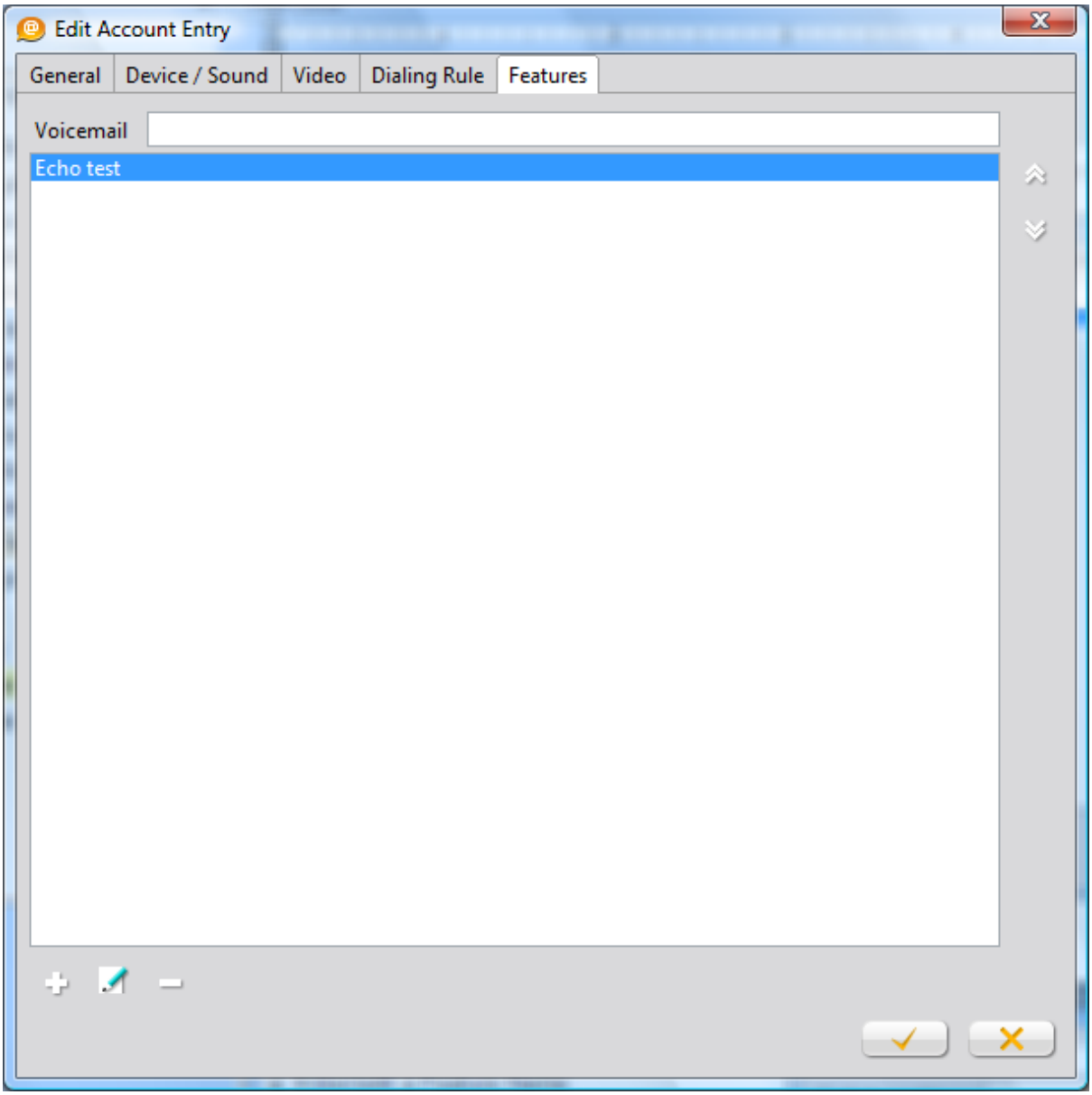
You can define your own, PBX specific features that can be turned on/off within the is-phone client.

- *Voicemail:* Enter phone access code to your voicemail box. By clicking on the voicemail icon in the status bar within the is-phone client, this number will be dialed
- *Add/edit/delete features:* Use the following symbols to add, edit or delete features:

add an international phone range

edit an international phone range or

delete an international phone range



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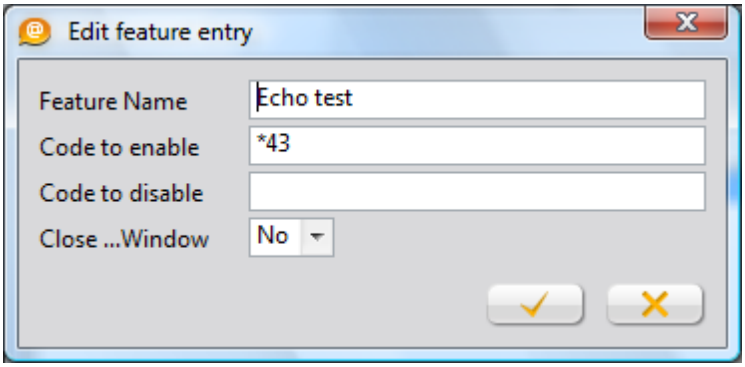
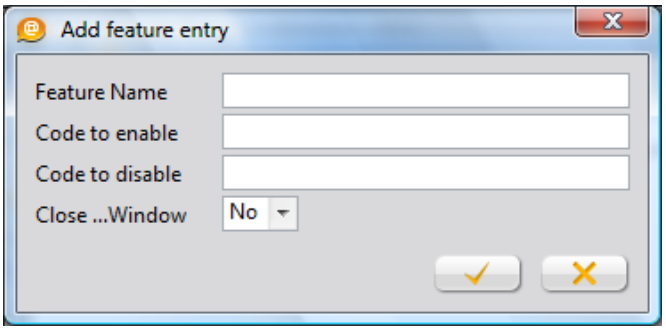
When you edit or add a feature, the following window will appear (Echo test used as example):



When you add or edit an entry, a new window appears and you can

- Enter/edit a Feature Name
- Enter/edit Code to enable the Feature
- Enter/edit Code to disable Feature
- Select if Call window should be displayed as call in a call tab or not (we recommend to first test a feature with Close window set to *YES*)



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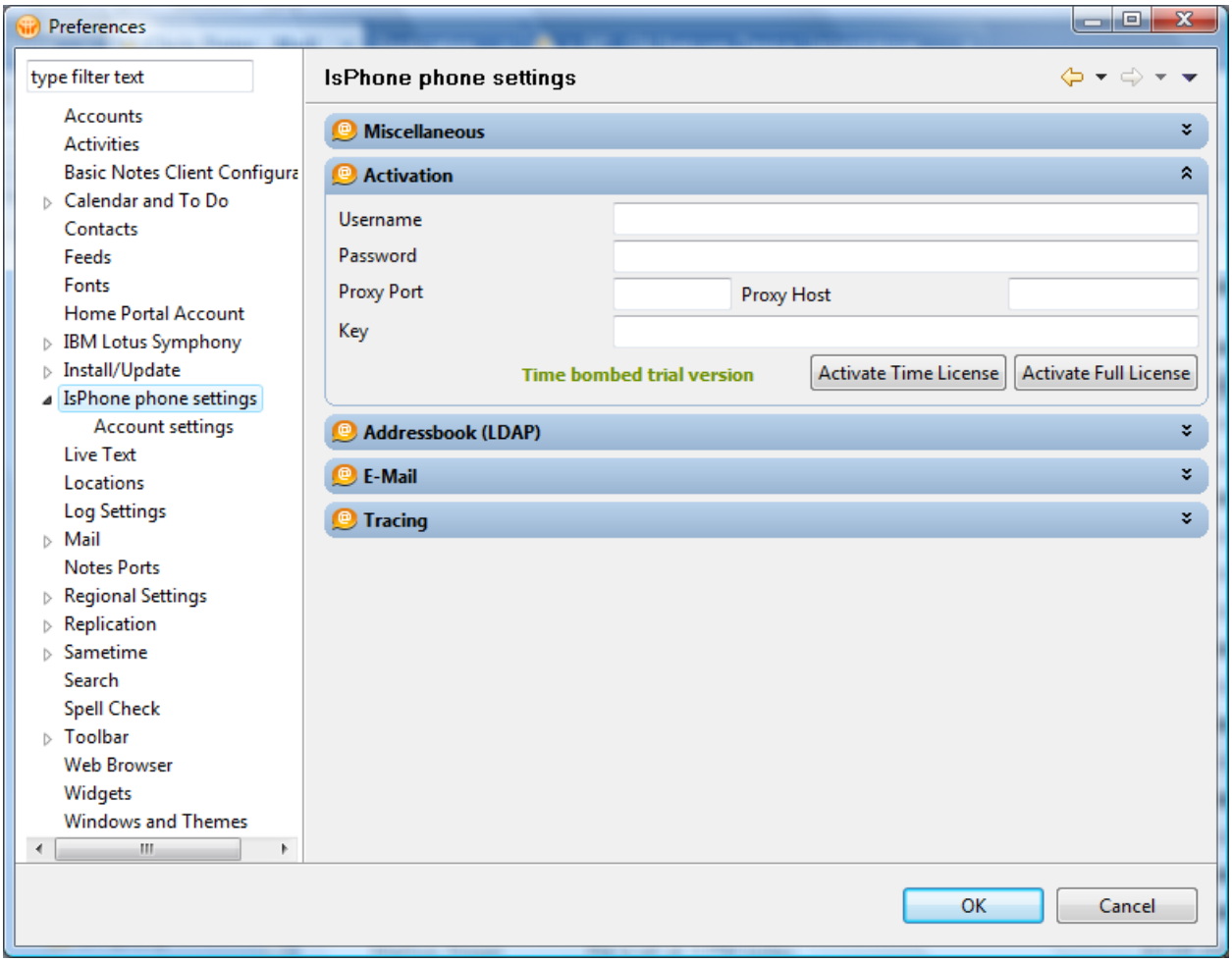
5.2 Client Settings

You can access the client settings by clicking on "IsPhone phone settings".



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5.2.1 Miscellaneous Settings

- *Close Call Tab automatically:* After ending a call, the call tab stays open until the user closes it manually. By enabling "Close call tab automatically", the call tab will close automatically unless the user enters text in the note tab (Subject/Notes)
- *Automatically off Hold:* Takes the call automatically off hold before transfer
- *Enable echo canceller:* This will turn on echo cancelling
- *Enable STUN Server:* You can use STUN server by flag it and by defining the STUN server. Enter the TCP/IP Number or the DNS name of your STUN Server. Leave it blank if no STUN server is used.
- *Show phone status in Sametime:* Displays additional phone status icons in the buddy list of Sametime
- *Change my status in Sametime:* Changing of Sametime Status when on the phone (change to yellow)
- *Status text:* Define the text that will be displayed as your status within Sametime
- *Reject 2nd call:* If you are in an active call and another call comes in, the 2nd call will automatically rejected
- *Forward 2nd call:* Enter the forwarding phone number. If "Reject 2nd call" is enabled, the 2nd call will be automatically forwarded to this number (e.g. voicemail)
- *Call forward unconditional to:* Forwards any call to this number if activated
- *Language:* Set the language that will be used when starting the is-phone client

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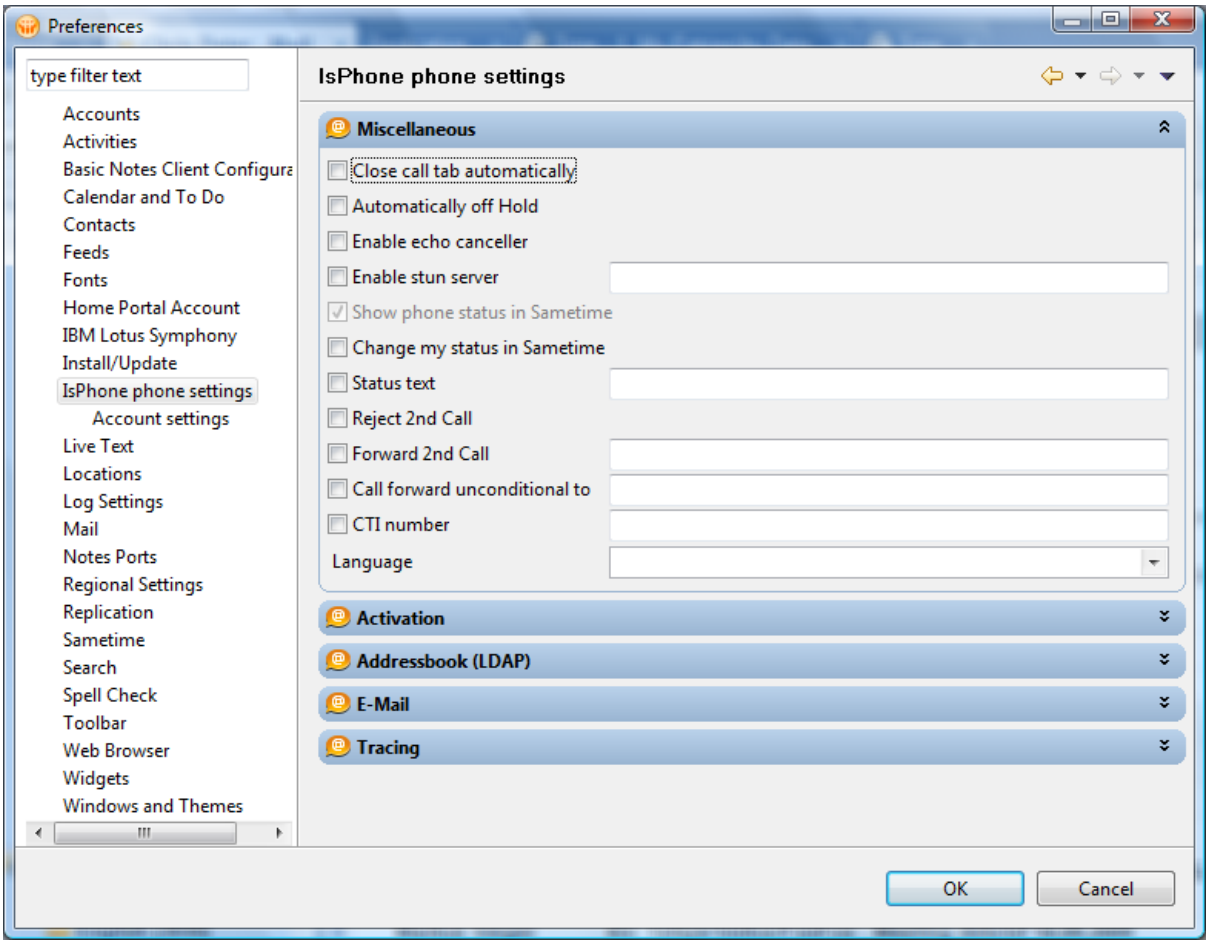

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5.2.2 Activation Settings

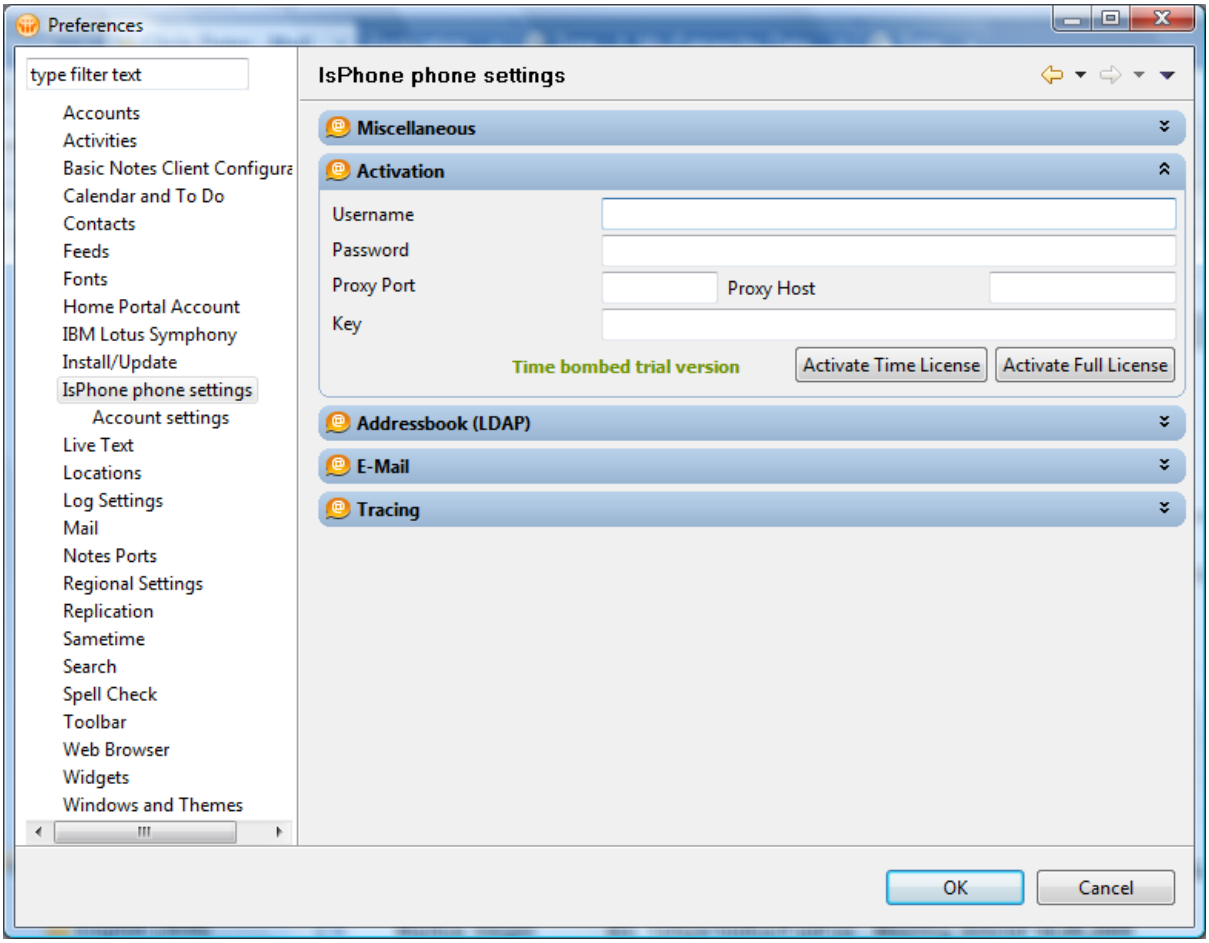
To activate a license, please enter

- *Username*
- *Password*
- *Proxy Port*
- *Key* (provided by your administrator or is-phone supplier)

If you are using a trial version of is-phone for IBM Lotus Notes/Sametime Plug-In, this will be indicated besides the activation buttons.

If you have an activation key (number), you can enter the number in the *Key* field and press either

- *Activate Time License* to activate a time limited license
  or
- *Activate Full License* to activate a full license without time restriction



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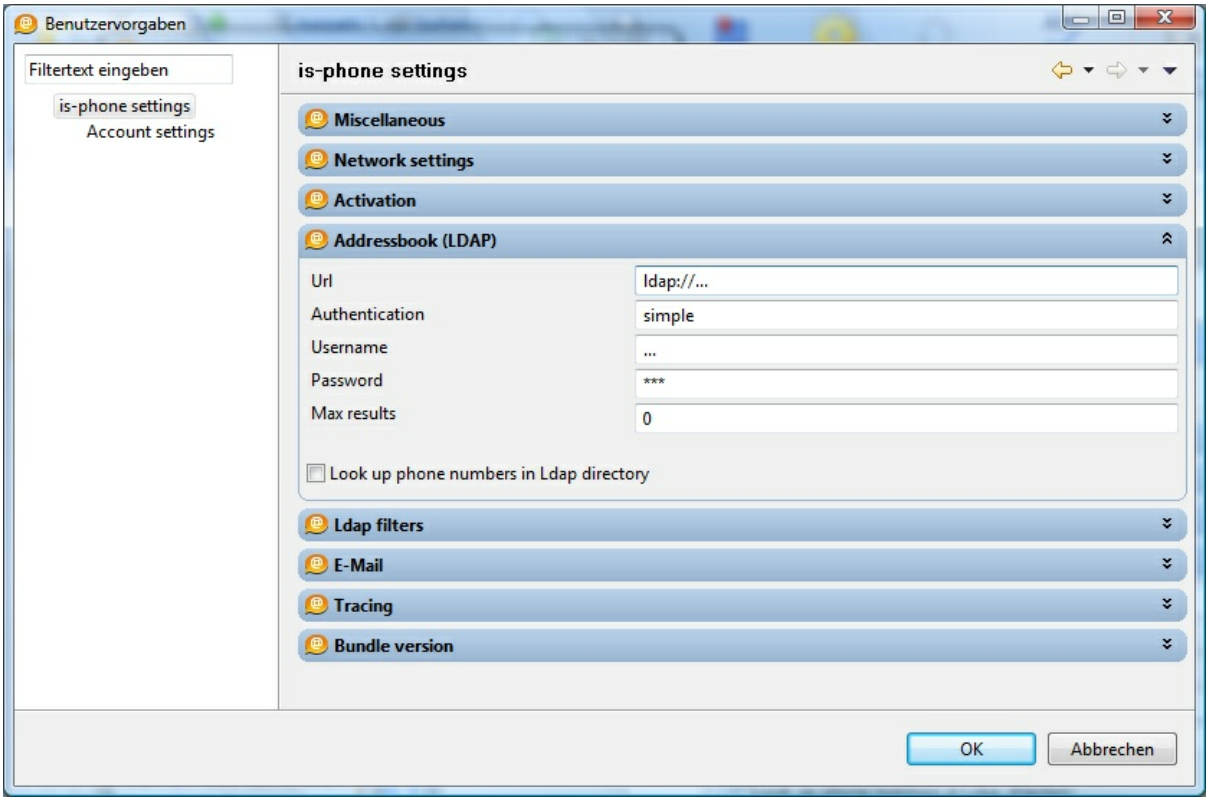
5.2.3 Addressbook (LDAP) Settings

You can connect an LDAP directory by entering the server/authentication information.

- *Url:* HTTP address from your LDAP directory
- *Authentication:* Enter the authentication for accessing the LDAP directory
- *Username:* Enter the username to access the LDAP directory
- *Password:* Enter the password to access the LDAP directory
- *Max results:* You can limit the maximum LDAP entries that will be loaded into the is-phone client



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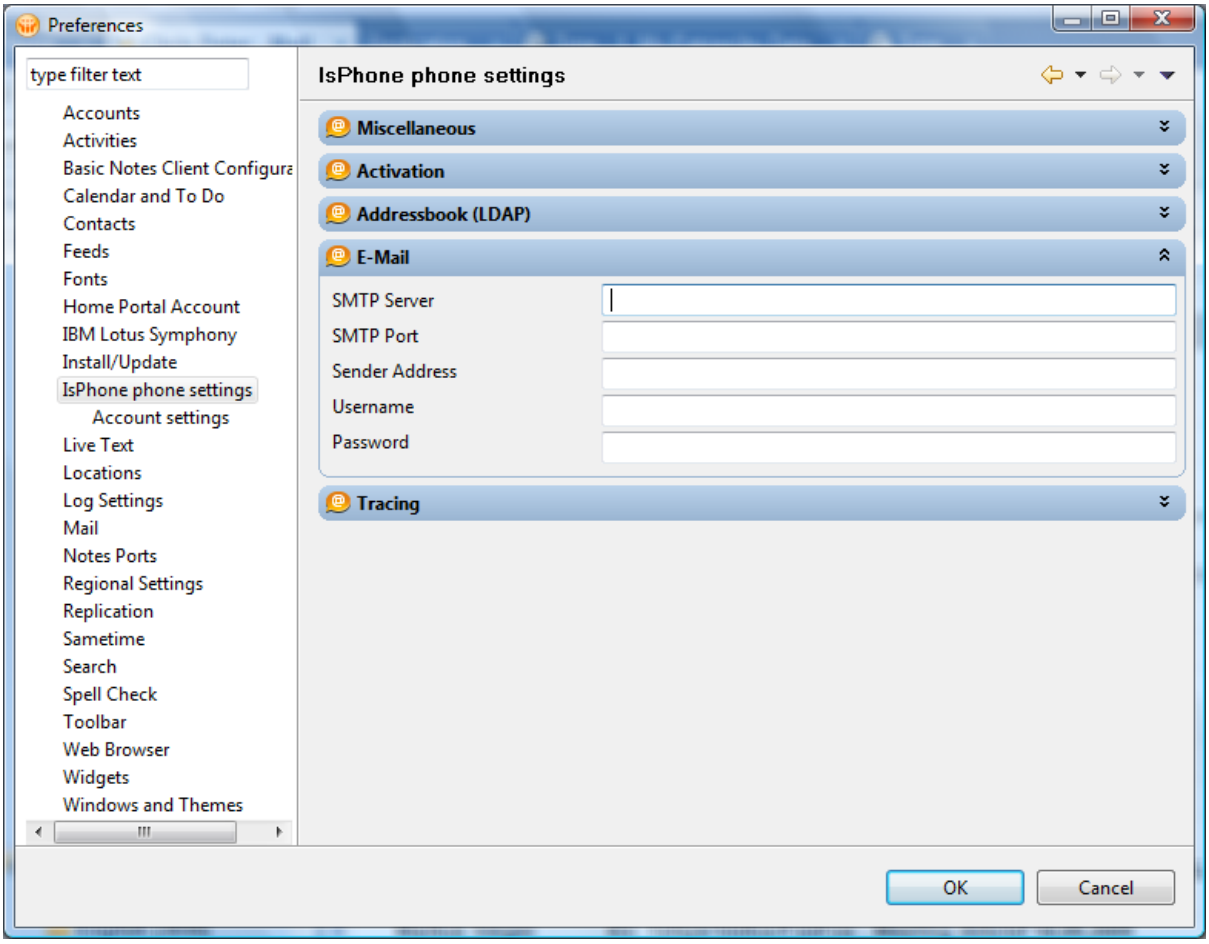
5.2.4 E-Mail Settings

By entering an SMTP Server, you are able to send the call notes/recordings via email.

- *SMTP Server:* Enter the HTTP address of your SMTP server
- *SMTP Port:* Enter the SMTP port number
- *Sender address:* Enter the email address of the sender
- *Username:* Enter the username for the email account
- *Password:* Enter the password for the email account



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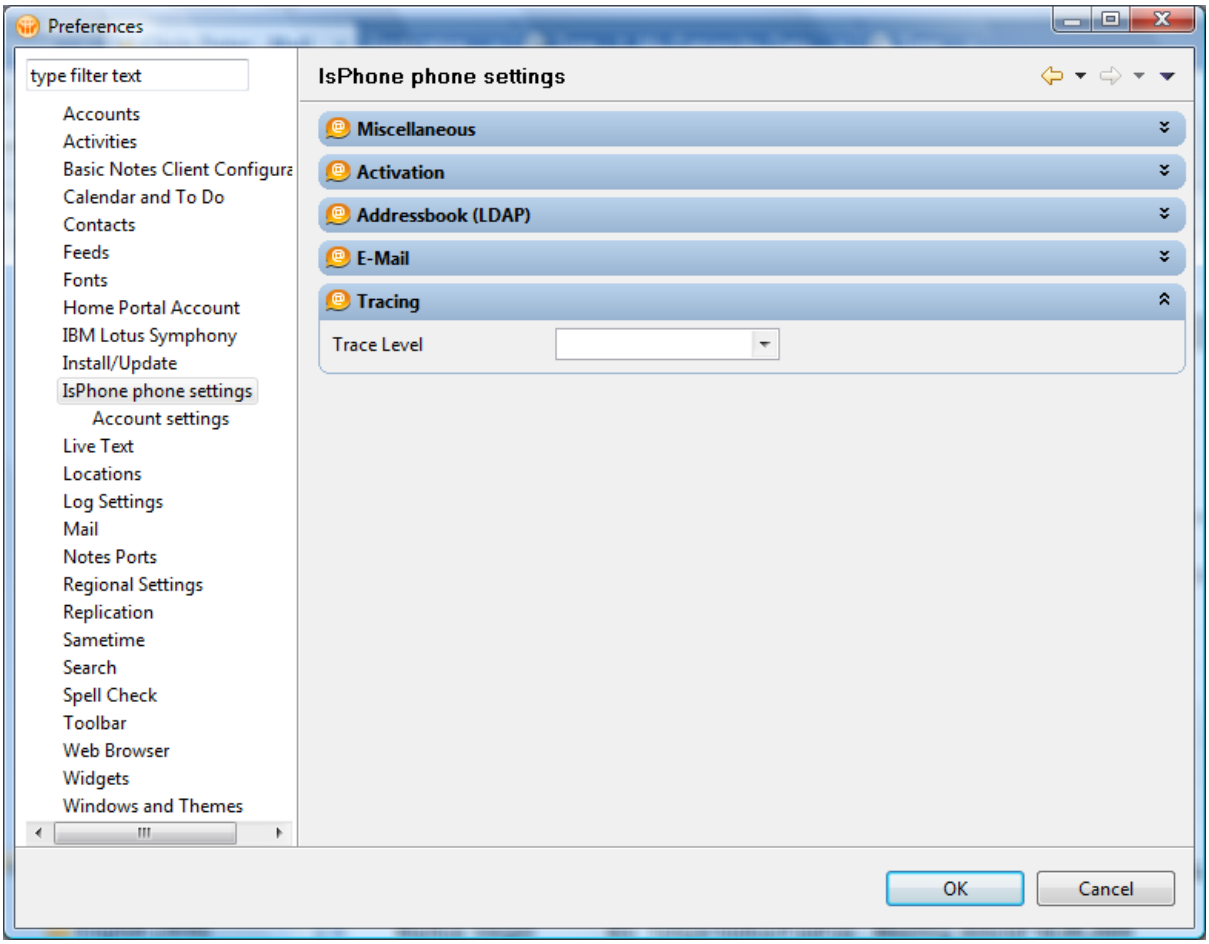
5.2.5 Trace Level Settings

The trace level enables you to record traces for the iscoord support team.

Please enable tracing by selecting the trace level according to instructions of the iscoord support team:

- PRODUCTION
- ERROR
- WARNING
- DEBUG
- INFO



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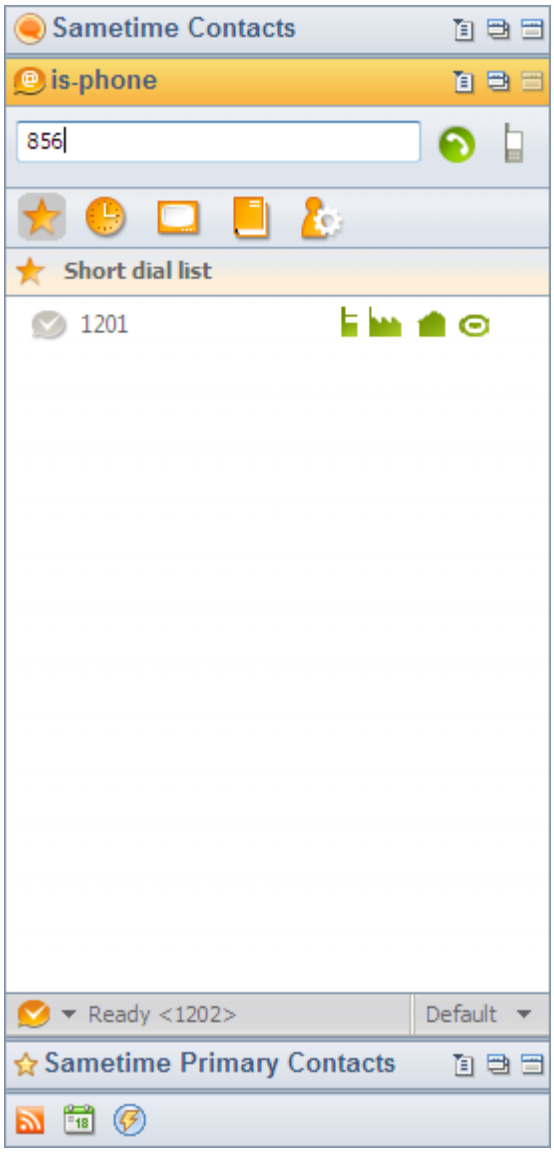
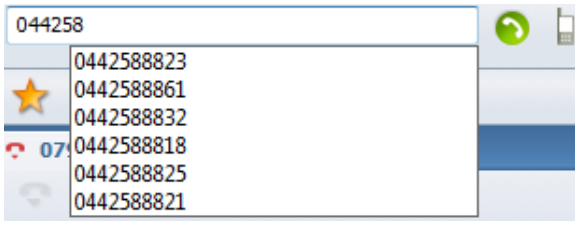
6 Basic Functions

6.1 Handling Outgoing Calls

You have several possibilities to start a call:



- Enter a phone number in the dial field. Numbers that you have already dialed will appear in a drop-down window (forward typing function) and you can also select the number from the drop-down list



and
- press the *green Call button*

or
- the *grey CTI button* (if you have enabled the CTI function)

or
- press the *Enter key*

Please note that for outside calls you first have to dial the external line prefix (trunk access code). Here are some examples, how to dial:
- internal 856
- local 0 456 3445
- regional 0 719 456 3445
- international 0 001 719 456 3445

or
- formatted +1 719 535 9007 (recommended)

Spaces and special characters such as “/” and “–“ may, as a general rule, be included in the phone number. The trunk access code is 0 or 9 in many companies.

- Enter the *Short Dial list*

and select an entry by right mouse click on the entry and selecting the number you like to dial or click on one of the green icons
- Mobile phone:
- Office phone:
- Home phone:
- Direct phone:

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- Enter the *History list*

  and select an entry by right mouse click on the entry
  and select *Call*

- Enter the *Address book list*

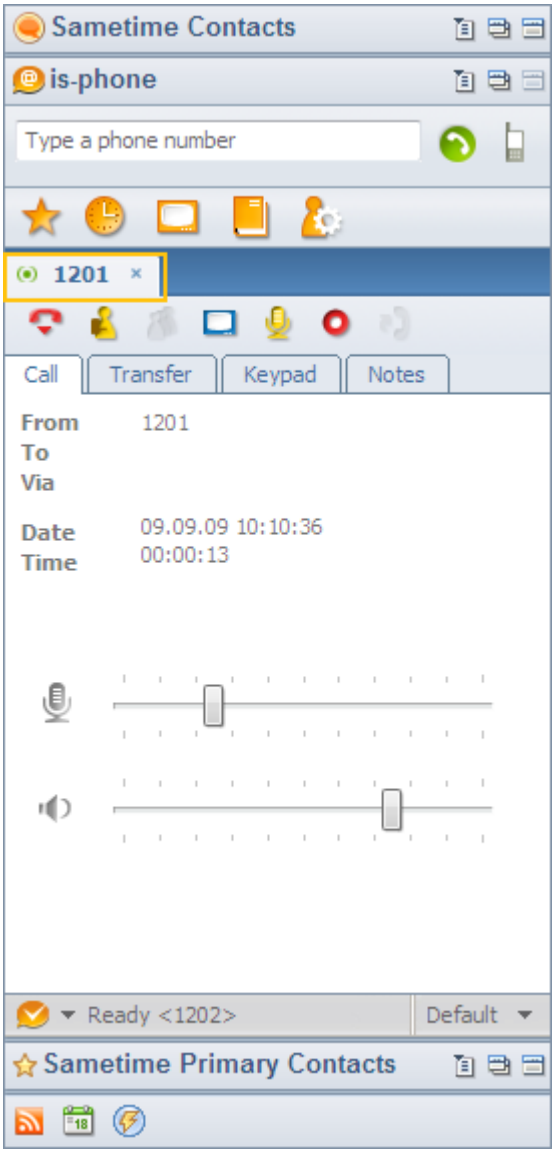
  and select an entry by right mouse click on the entry
  and select *Call [number]*
  to start the call.

While a call is being set up, you will see a new call window tab that displays the phone number and on the left of the number

- a green dialing symbol when the dialing is in progress

- a green head set icon when the call is established and connected

- a red head set icon when the call has ended or couldn't be established/connected



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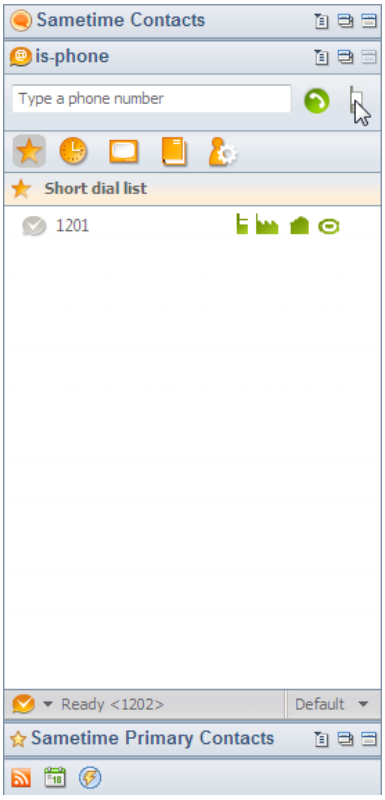
6.2 CTI Hardphone usage

When you click on the mobile phone icon (located right to the chat button), then your configured (see settings) CTI phone (e.g. hard phone or mobile) will be used instead of the is-phone for IBM Lotus Notes/ Sametime Plug-In softphone to place a call.



Inactive CTI function:

Active CTI function:

When the CTI fuction is active (orange), the softphone first starts a call to your CTI phone (phone number or extension) – when you take this call on your CTI phone, the call will be forwarded to the destination number. This function works when you start calls from the dial field.

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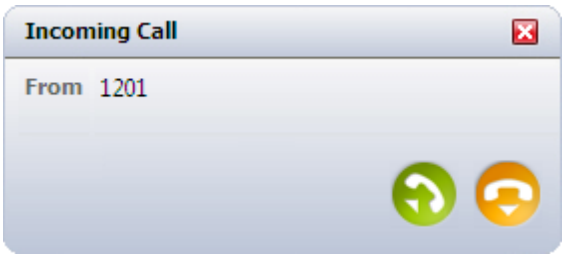
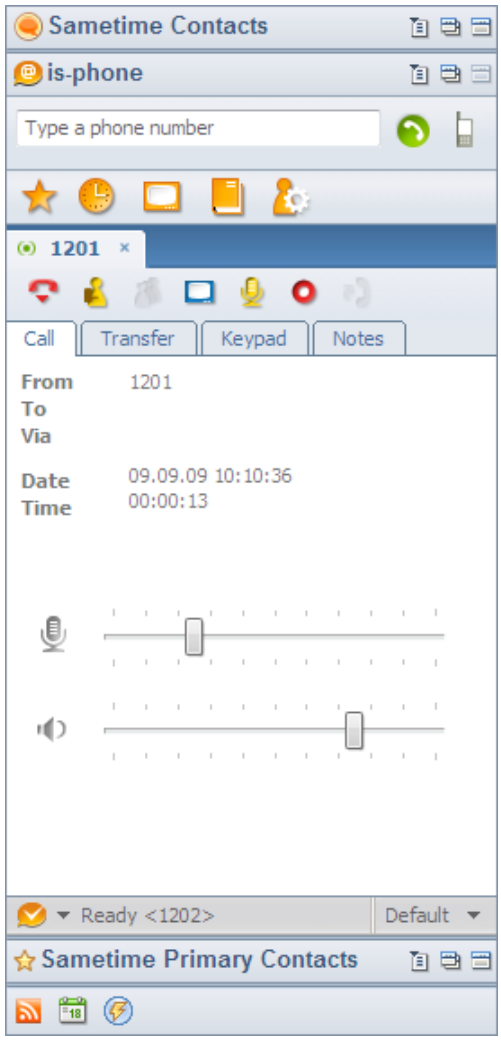
6.3 Handling Incoming Calls

When someone calls you, the caller's phone number will always be shown on your screen (except when numbers have been suppressed). Caller's name maybe displayed too. Names are always displayed for in-house calls or if the phone number could be resolved from the loaded Lotus Notes contacts.

When someone calls you, a small alert window will appear on the screen to signal the incoming call. It will be acoustically signaled as well on the ringing device.





Then you have the following options:

- Accept the call by clicking on the green button

or

- Reject the call by clicking the orange reject button

or
click the close icon within the call tab that has opend

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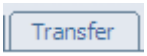
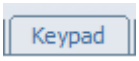
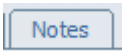
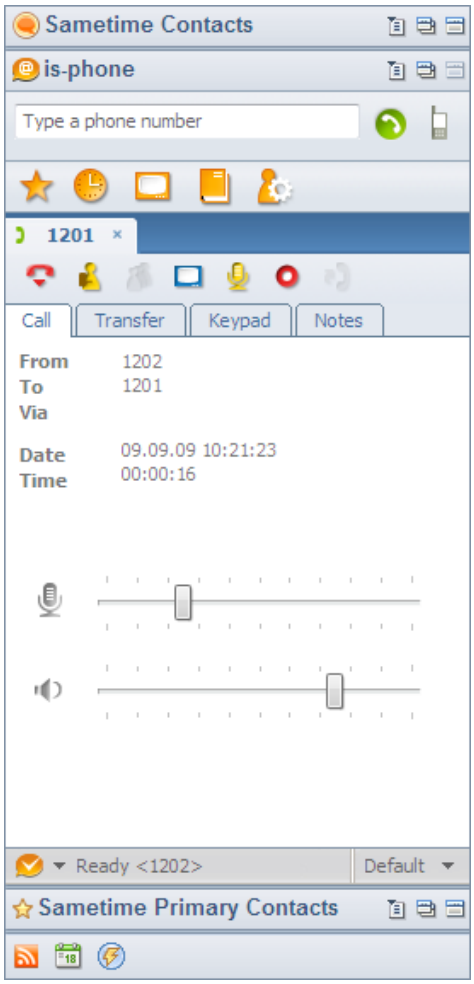
6.4 Active Call

Every call you conduct will open a call window tab. Thus, if you make two or more calls simultaneously, you will have two or more window tabs open at the same time. While a call is in process, there are several options:

- Switch between active calls by clicking on the *Call Tabs*
- Disconnect a call: or
- Put Call on hold / off hold:
- Start a conference call:
- Switch audio call to a video call:
- Mute microphone of active call:
- Record a call:
- Recall a number (only active when call has ended):
- Transfer call: 
- Send DTMF tones: 
- Take call notes: 
- Change audio settings:



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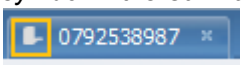
6.5 Put a Call on Hold / Take a Call off Hold

Scenario: You have got a call and want to put it on hold / take it off hold.

- In an active call window, you can click on the *on/off hold icon*

  and the call will be set to on hold, indicated by the *Hand symbol* in the *Call Tab*

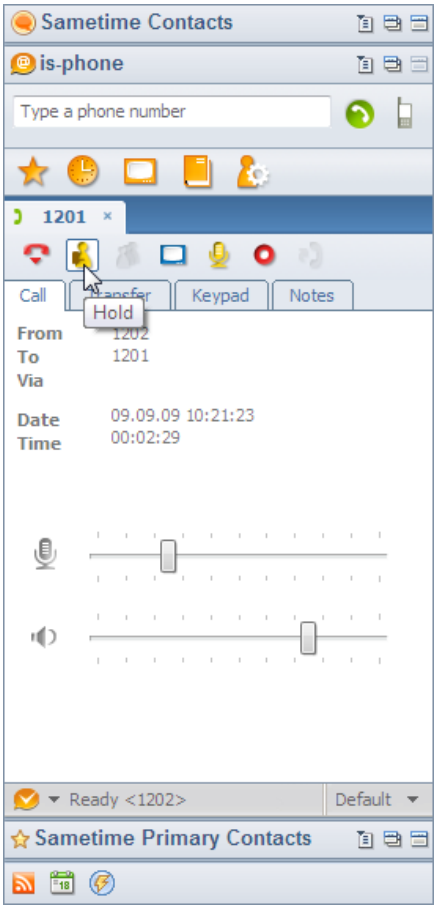
  and the now activated *on/off hold icon*

- To activate a call that is set to on hold, you need to select the respective *Call Tab* that is on hold and click the activated *hold/off hold icon* again till activation is off.

  - Set call on hold icon:

  - Set call off hold icon (call is set to on hold):

Note: If you have several calls active, when you put one call off hold, all other calls are put automatically on hold.



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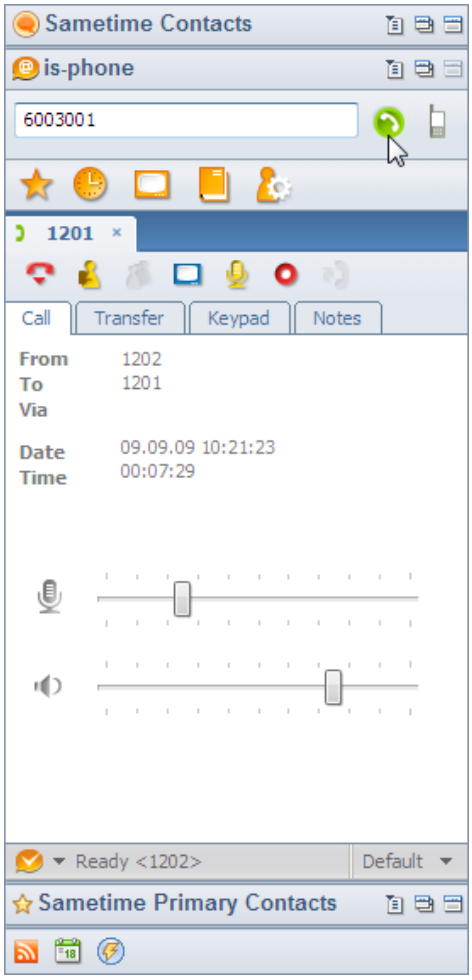
6.6 Place an Additional Call

Scenario: You are in an active call and want to place an additional call (e. g. consultation).

There are several methods by which you may place an additional call:

- *Dial entry field* followed by the *Enter key*, the *green button* or the *CTI button*
- Dial out of the *Short dial list*
- Dial out of the *History list*
- Dial out of the *Address book*



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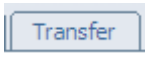
6.7 Connect Calls

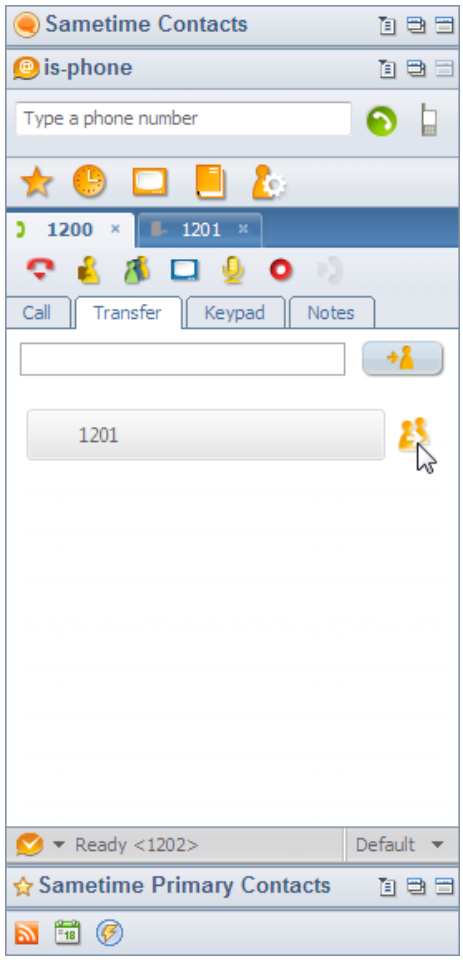
Scenario: You have a connected call and want to transfer it to someone else, but before doing so, you want to make sure that the other person is ready to take the call.

- Set up the second call, the active call will be put on hold automatically. Tell your second call partner that you have a call you wish to transfer to her/him
- Click on the Transfer tab

- Click on the *Connect button*

  to connect the two active calls. When the calls are connected successfully, the calls will end (indicated by the red icon within the *Call Tab*)



Note: If you have several calls active, a list with all calls appears in the *Transfer tab* and you can forward the call by simply clicking on the respective tab and then on the *Transfer button*.

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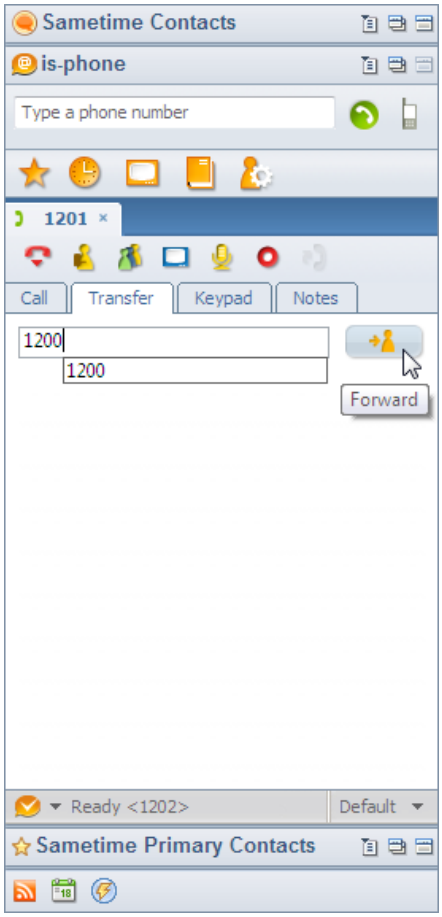
6.8 Unattended Call Transfer

Scenario: You have a call you want to transfer directly to someone else without consultation.

- When you click on the *Transfer tab* in the active call window, you can enter the new phone number (the transfer to destination). When you click on Transfer button
the call will be connected. When the calls are transferred successfully, the *Call tab* will indicate that the call has ended (see *Call tab* with ended call icon on the left side).



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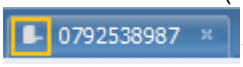
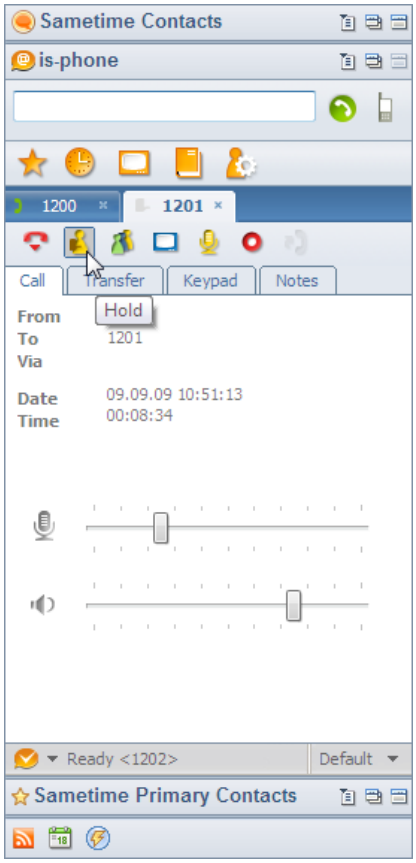
6.9 Switch between Calls

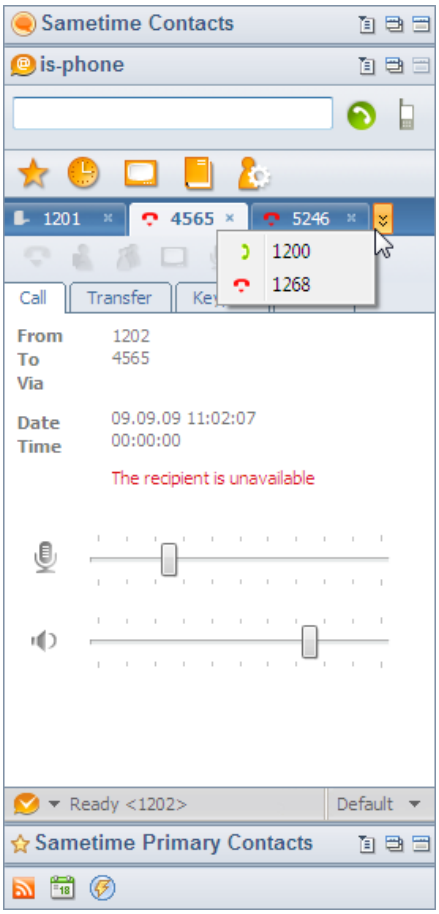
You can switch between active calls.

- Click on the *Call tab* of the party with whom you like to speak and that is on hold (indicated by the hand icon 

)
- Click on the *On Hold icon* again to reactivate the call that is on hold
The other call is automatically put on hold.



When you have multiple calls active and you can't see all the calls in the tab, then click on the *Arrows*
to the right of the call tabs and you will get a drop down list with all calls. When you select a call, this call will be displayed as *Call tab*



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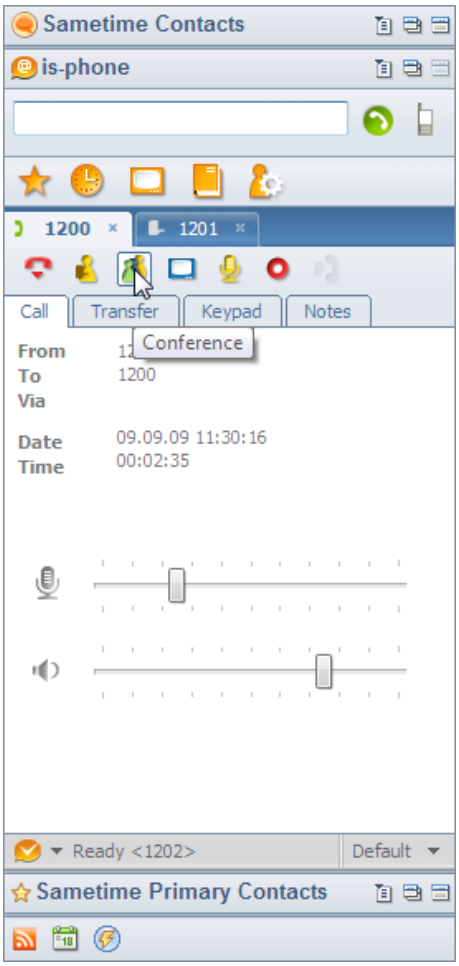
6.10 Start an Audio Conference Call

You can conduct audio conference calls with up to 16 participants (15 calls and yourself), depending on the performance of the PC workstation you are running the is-phone for IBM Lotus Notes/Sametime Plug-In.

- Call all participants of the conference call (one after the other)
- ***Set up conference:*** All active calls and all calls on hold are linked into a conference by clicking on the conference button
- ***End conference:*** End the conference either by clicking on the conference button again or ending the individual calls

Note: The amount of simultaneous calls depends on your PC's performance and network connection.



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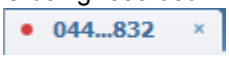
6.11 Record a Call

All calls can be recorded for personal use only. Be aware that your local system administrator can block this function. Please also note that the use of the call recording function is subject to your country's and company's legal requirements/regulations.

- Start recording: Press the record button, and the call in progress will be recorded.

  There is a red bullet in the *Call tab* indicating that the call is being recorded

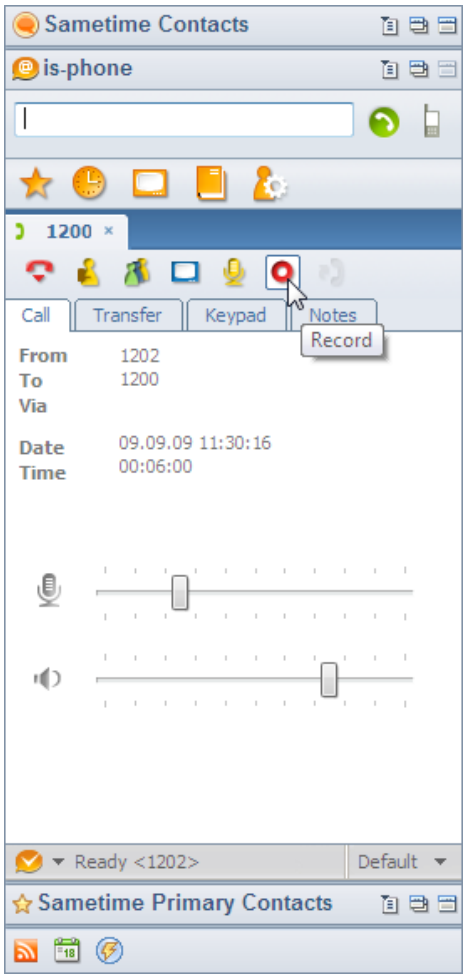
  

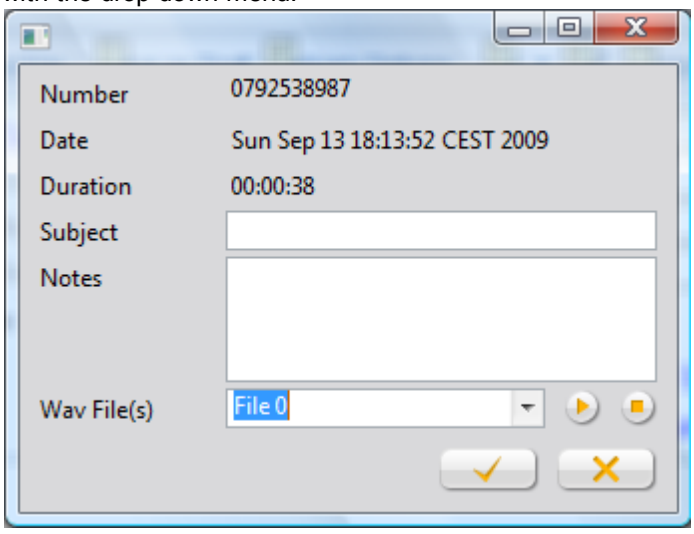
  and the *Recording icon* is activated

- Stop recording: If you click on the activated call *Recording icon,* the recording will be stopped.

- The recording will be saved in a *.wav file*. To access the recording, open the call log *History list* and *Double click* on the call that has been recorded.

- If the call has been recorded, this will be indicated by a filename in the field *Wav File(s)*. If you have made several recordings during one call, you can access all recordings with the drop-down menu.





- To listen to a recording, press the play button .
- To stop the playback, press the stop button .

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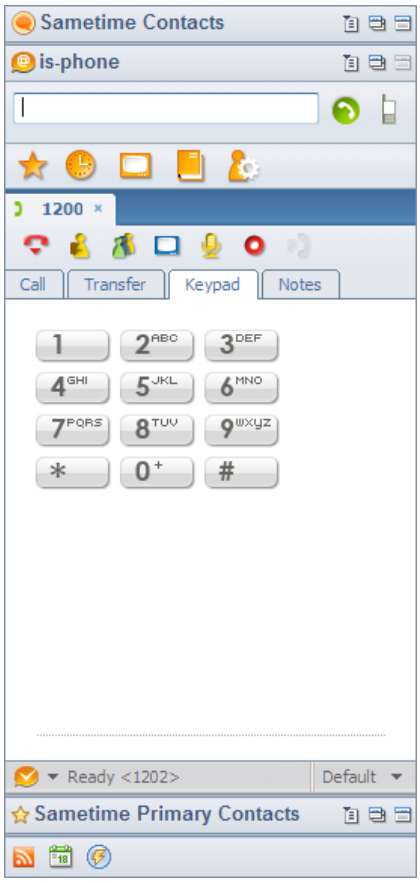
6.12 Send DTMF Tones

By using the keypad, you can send DTMF tones, needed to navigate within menu systems for accessing for example voice mail messages. The DTMF system allows the user to interact with the menu by clicking keys on the keypad.

- To do this, click on the *Keypad tab* in the call window during an active call. The window shown on the right will be opened, and you can click on the required digits/characters, **using the *mouse* (NOT the keyboard**). The digits you enter will be displayed in the client below the keypad.



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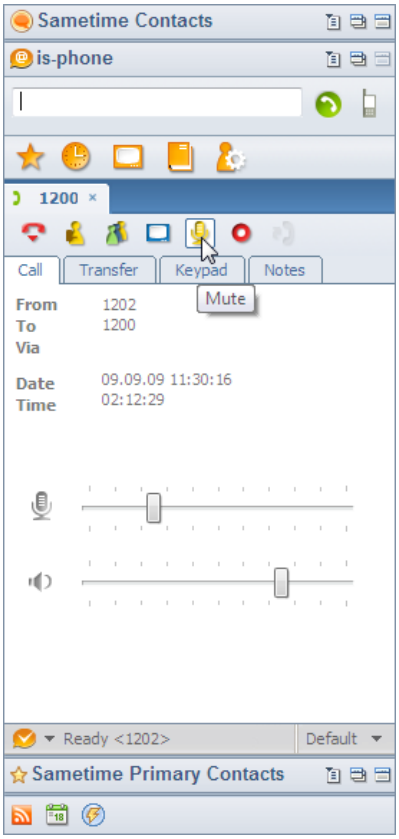
6.13 Change Audio Settings during an Active Call

You can change the audio settings during a call at anytime.

- Switch on/off microphone: When you switch off the microphone, your call partner will no longer be able to hear you, but you will still be able to hear your call partner (mute)

  Not muted:

  Muted:



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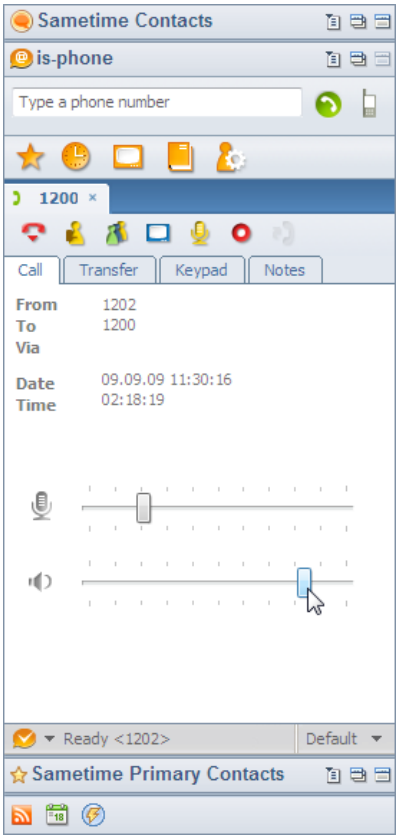
- Set microphone and speaker volume: If you are talking too loud or if you have trouble hearing the person you are talking to, you can temporarily change the audio volumes. To display the control panel, click on the orange speaker icon and change the volume. To hide the control panel, press the *"x" icon*.



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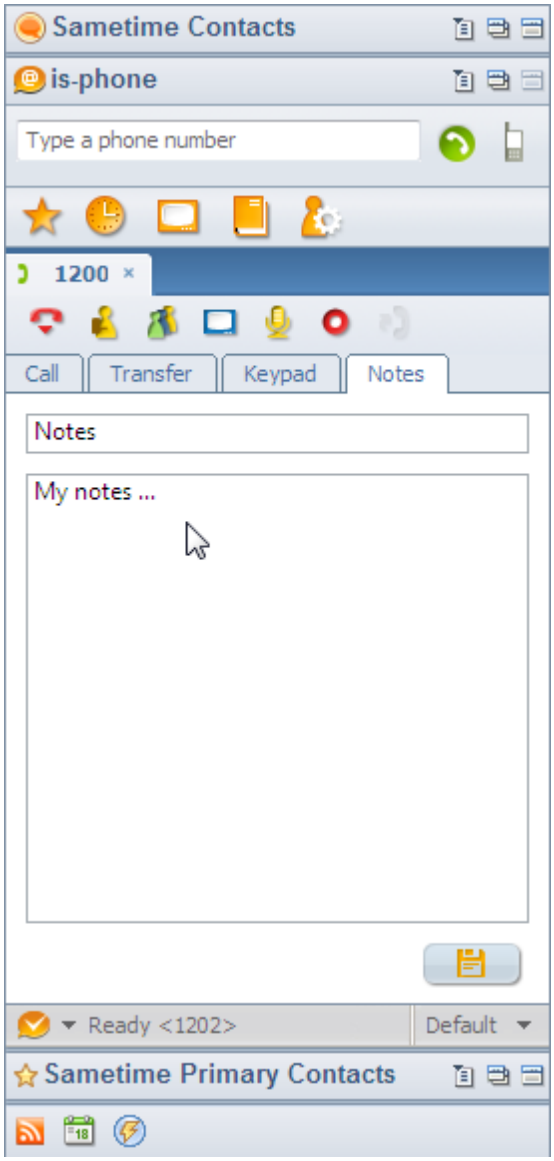
6.14 Take Call Notes

You can take notes in the call window at any time while the call is in progress or finished. The notes will be stored in the history.

- Click on the Note tab and start writing
- By closing the call tab, the notes will be saved and can be accessed within the history

Note: The notes will be saved together with call information, such as number, date, time etc.



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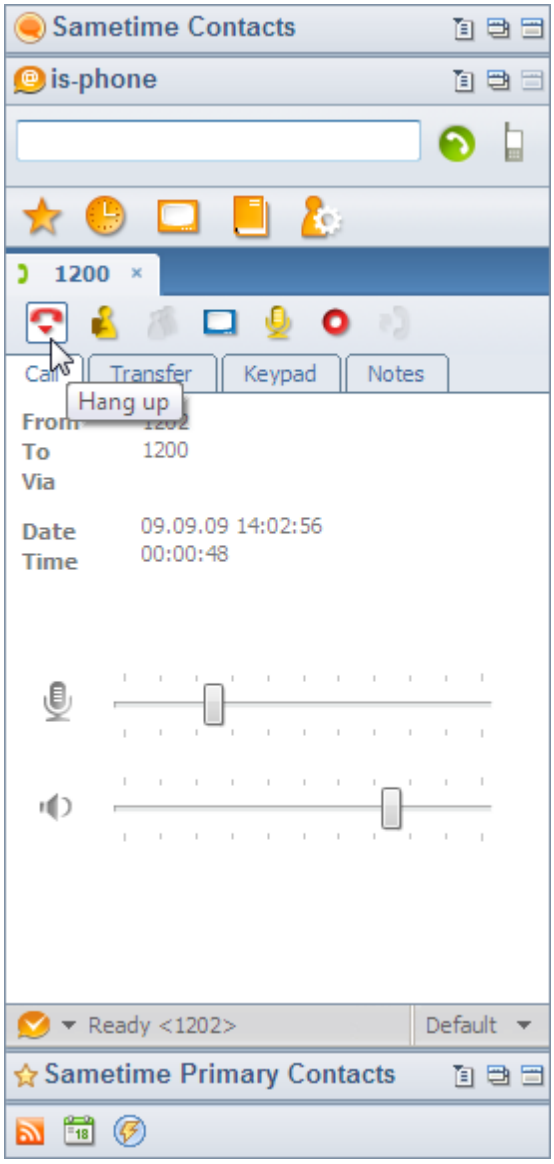
6.15 Disconnect a Call

- You end a call by clicking the red hang-up button

  or



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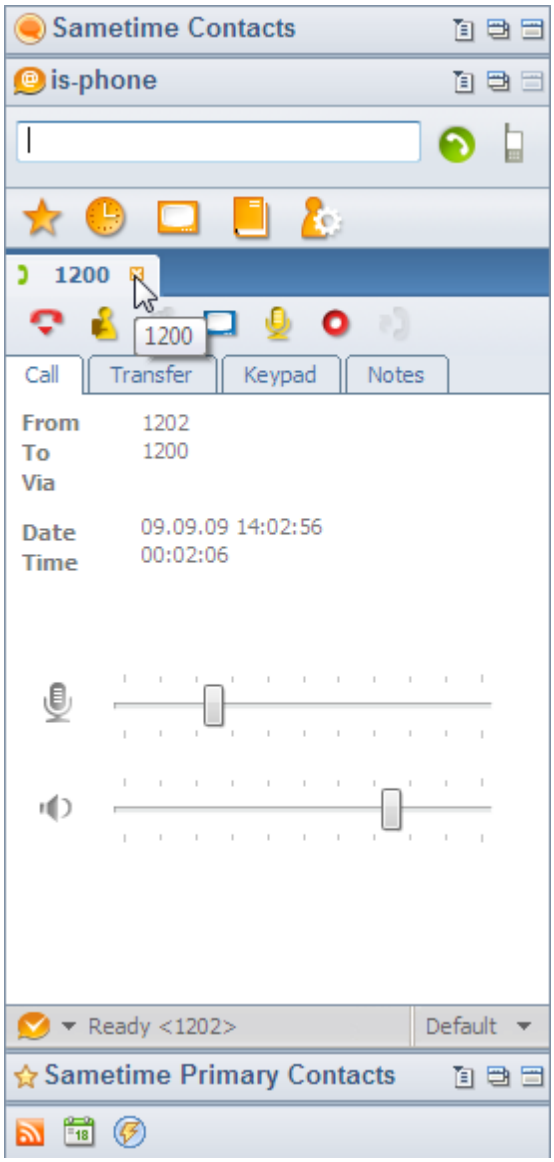
- by closing the call window



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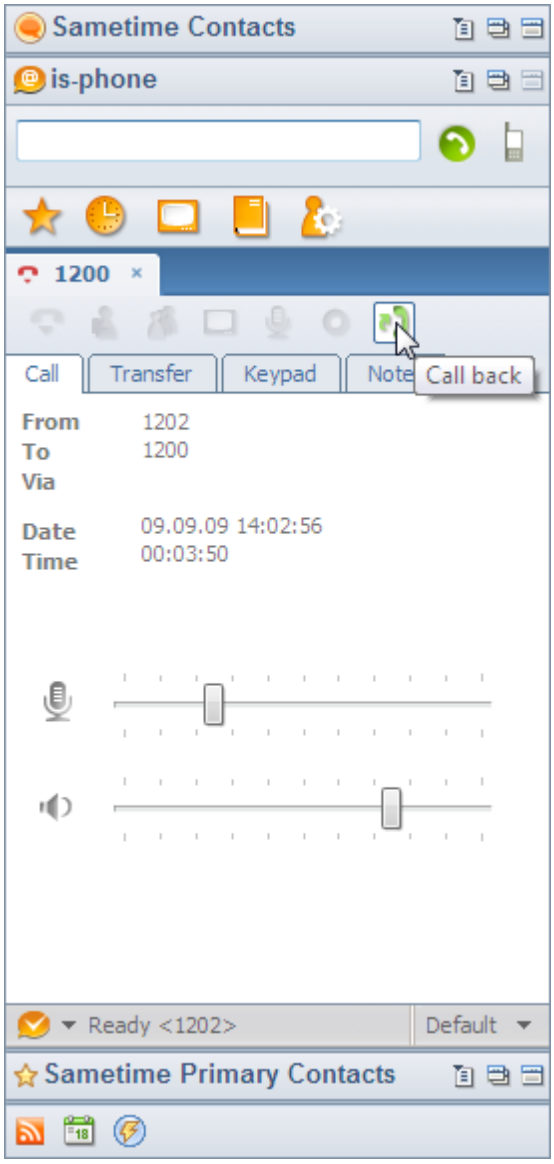
6.16 Redial

You can redial a number by clicking on this icon within the call window after a call has been disconnected.

- If you have made a call and you have ended the call by clicking on the orange button (NOT by closing the call tab), you can click this icon and the is-phone for IBM Lotus Notes/Sametime Plug-In will redial the number
- If you have answered a call and you (with the orange button, NOT by closing the call tab) or the caller has ended the call, you can click on this icon to redial the number of the caller again



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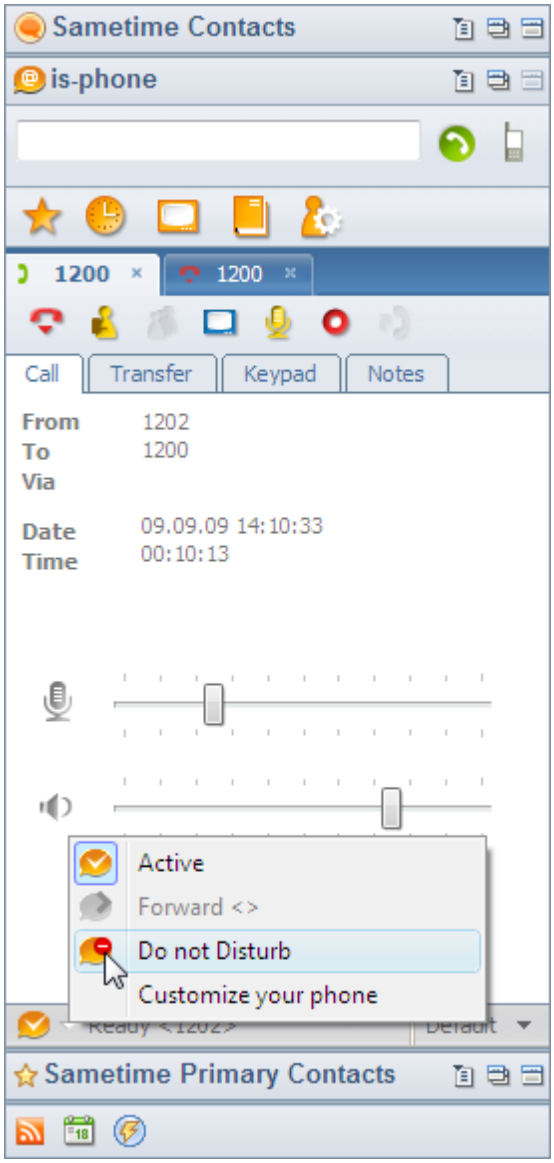
6.17 Show Availability Status

Availability refers to the ability to see whether a person is available:“online”, “on the phone”, “busy” and so on. The status is displayed within calls, contacts and the short dial list.

You can manually set your availability status anytime

- Click on the status icon to change your status:

  - Online:
  - Offline:
  - Do not disturb:
  - Forward <...>:



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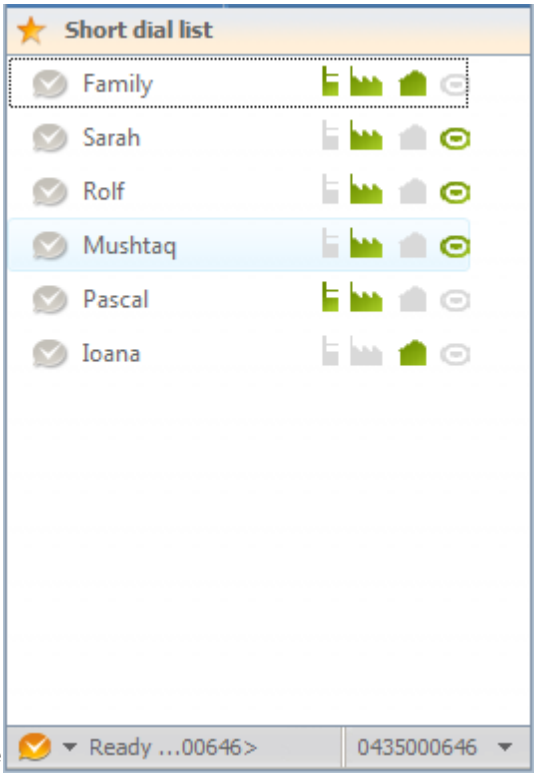
7 Other Functions

7.1 Short Dial List

From the short dial list, you can directly start phone calls or chat conversations just by clicking the appropriate icon next to the short dial entry.



- Mobile number:
- Office number:
- Home Number:
- Direct phone number:

On the left side of the name you can see the status of the entries/ contacts:

- Online:
- Offline:
- On the phone:
- Do not disturb:
- Forward <...>:

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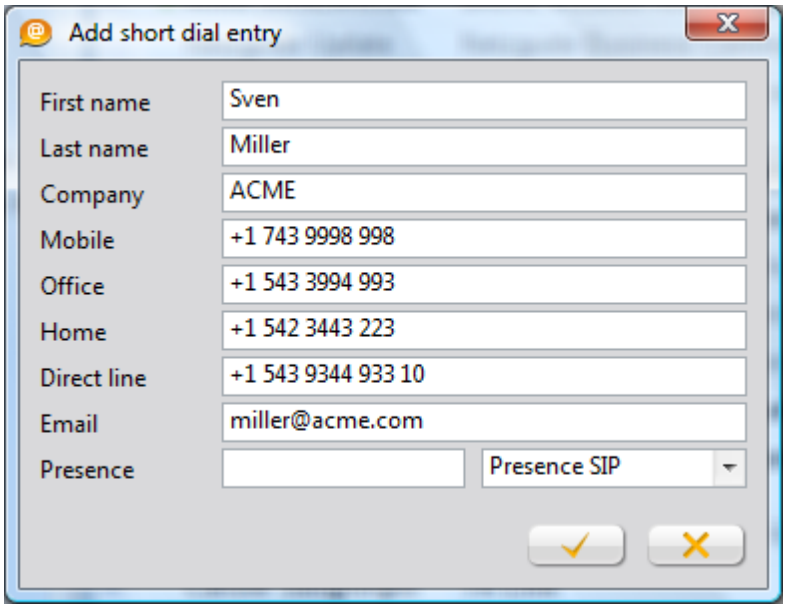
You can

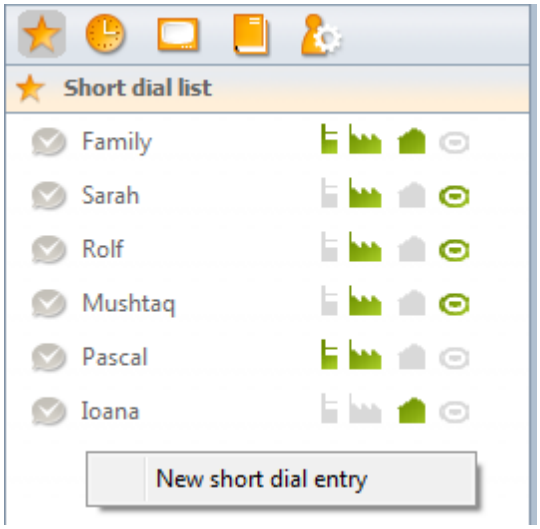
- edit an entry by double clicking on **the name**

  You can enter:
  - *Firstname:* Enter first name e.g. David
  - *Lastname:* Enter last name e.g. Tucker
  - *Company:* Enter company name
  - *Mobile:* Enter mobile phone number
  - *Office:* Enter Email address
  - *Home:* Enter home phone number
  - *Direct line:* Enter direct phone number
  - *Presence*: Enter presence name of the entry



- add an entry by right click below the last entry (white space)

- delete an entry by selecting the entry with the mouse and press *Delete*



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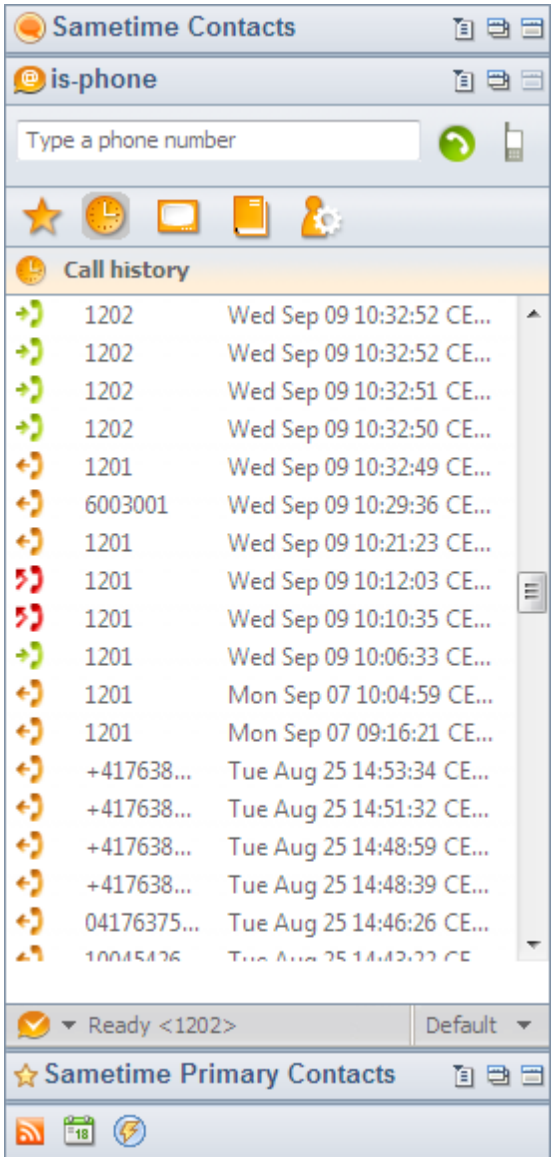
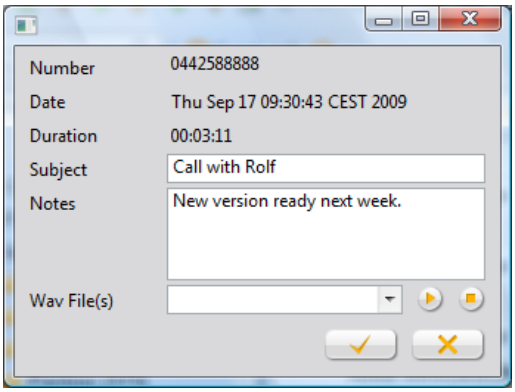
7.2 Call Log History

All calls are logged in the Call Log tab window

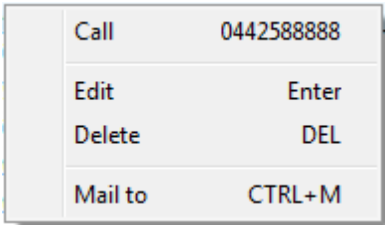

Sametime Contacts
is-phone
Type a phone number
Call history
1202 Wed Sep 09 10:32:52 CE...
1202 Wed Sep 09 10:32:52 CE...
1202 Wed Sep 09 10:32:51 CE...
1202 Wed Sep 09 10:32:50 CE...
1201 Wed Sep 09 10:32:49 CE...
6003001 Wed Sep 09 10:29:36 CE...
1201 Wed Sep 09 10:21:23 CE...
1201 Wed Sep 09 10:12:03 CE...
1201 Wed Sep 09 10:10:35 CE...
1201 Wed Sep 09 10:06:33 CE...
1201 Mon Sep 07 10:04:59 CE...
1201 Mon Sep 07 09:16:21 CE...
+417638... Tue Aug 25 14:53:34 CE...
+417638... Tue Aug 25 14:51:32 CE...
+417638... Tue Aug 25 14:48:59 CE...
+417638... Tue Aug 25 14:48:39 CE...
04176375... Tue Aug 25 14:46:26 CE...
Ready <1202>
Default
Sametime Primary Contacts

- Green handset = incoming call:
- Orange handset = outgoing call:
- red handset = missed call:

- *Double click* on a call: You can see and edit the call with all details:



- *Right button mouse click* on an entry to call the number, edit the entry, delete the entry or email the entry:



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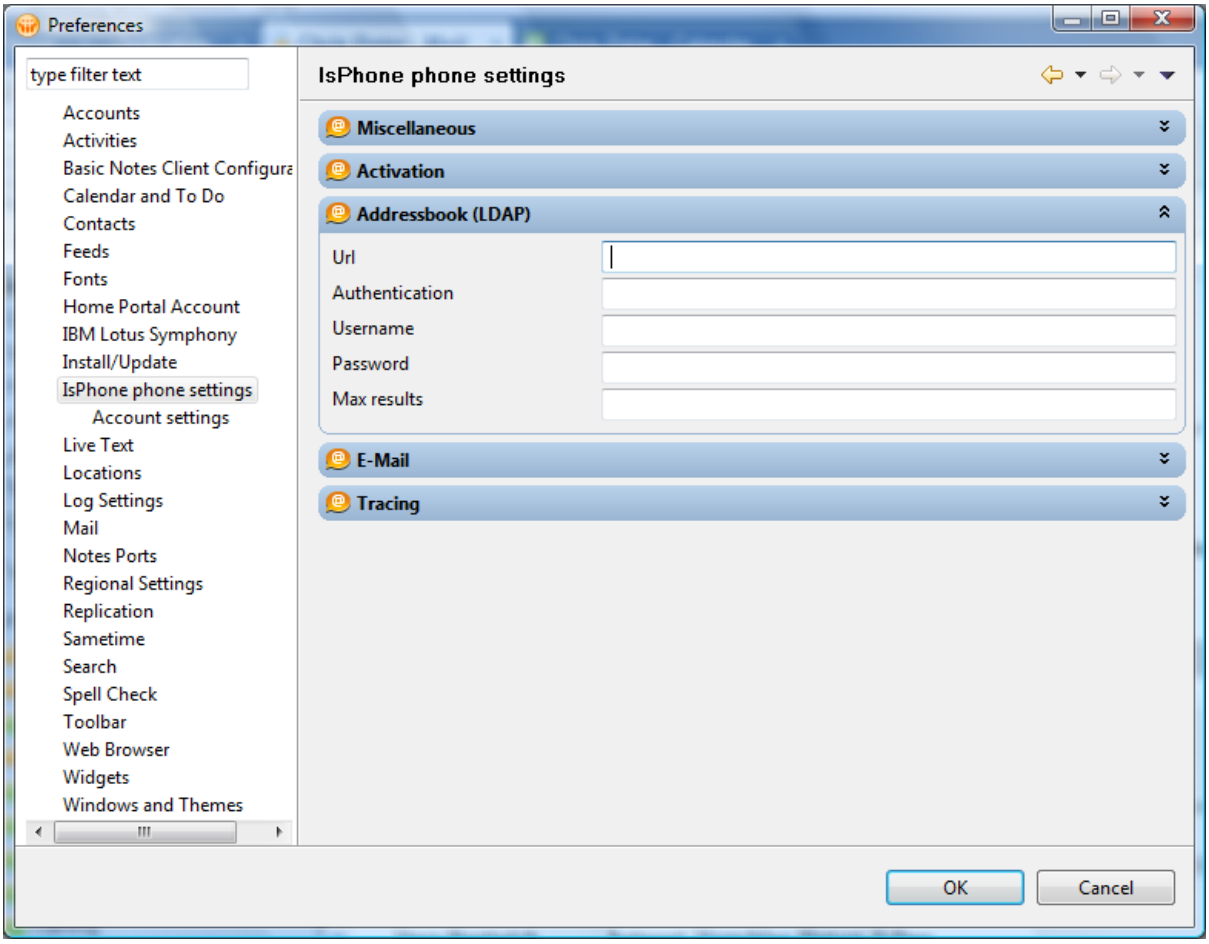
7.3 LDAP

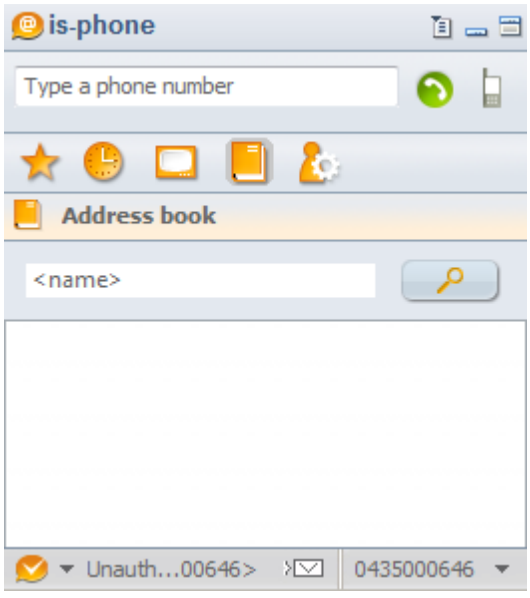
With this function, you have a direct access to contacts through LDAP.

To use LDAP, you need to configure it in the phone setting.



When you have correctly entered the LDAP connection, you can search for contacts in the address book.

- Enter first or last name or the first letter of a name you are search into the search field (<*name*>) and press the search button



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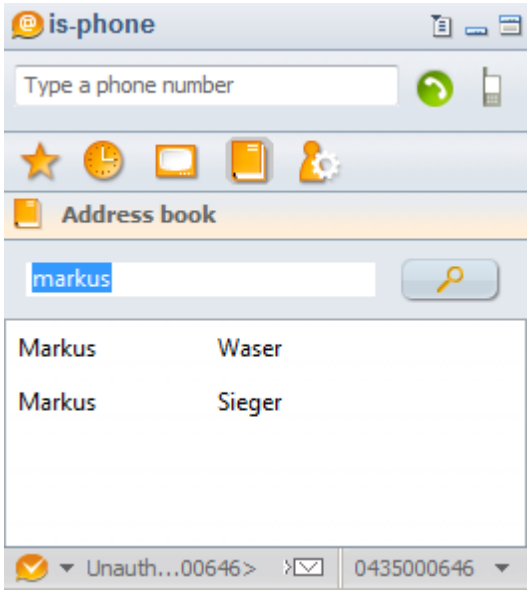
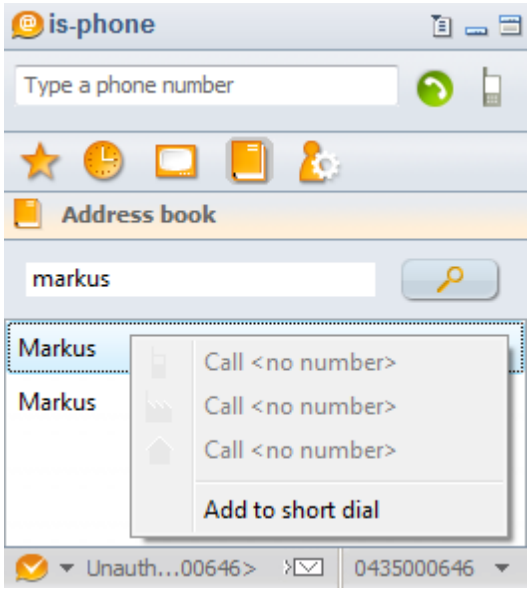
- The respective names will be shown in the listing



- With a *right-click* on a name, you can dial the number.
- If in the LDAP directory no phone number was entered, this will be shown as *Call <no number>*.
- You can also add an entry to the short dial list by selecting *Add to short dial*



You can select/search (forward typing is supported) the address book by entering

- Name (first name and/or last name e.g. “Rob M” for e.g. Robby Menge)

Note: To delete a contact in the address book, you need to delete the entry within the LDAP directory. To add a contact, enter the contact within your LDAP directory.

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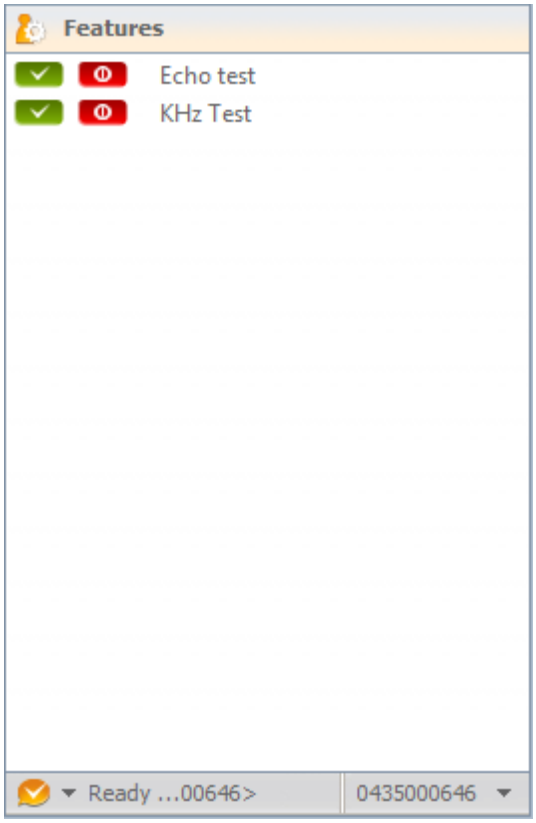
7.4 PBX Feature Codes

You can enter the feature codes by clicking on the *Feature icon*:

- Turn on feature:
- Turn off feature:



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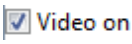
7.5 Video Function

Calls made with is-phone for IBM Lotus Notes/Sametime Plug-In work without a video cam, although a camera is necessary for video calls to remote parties. is-phone for IBM Lotus Notes/Sametime Plug-In supports most USB video cams. If no camera is installed, there is an option to display an image (format .jpg). Details how to configure can be found in the “Configuring the is-phone for IBM Lotus Notes/ Sametime Plug-In” chapter.

By clicking on the video icon during a call, the client switches to the video tab and the video button is turned active (inactive:). If you turn back to the active call window by clicking on the *Call Tab*, the video icon is turned on and indicates that you are still in a video call.

You can turn on you camera by flagging the box *"Video on"*:



If the camera is off, the other participant/s can’t see your video picture and will see either nothing or the static picture you have uploaded (see chapter "Client Settings").

If you are in a call and the other party has video turned on, then you will see the caller when clicking on the video button .

If you are in a conference with 1 till 3 other parties and everybody has turned on video, then you will see all conference call attendees.

Note: The amount of simultaneous video calls depends on your PC’s performance and network connection. Therefore it is recommended to not exceed video conferences with more than 4 participants (incl. yourself). Depending on the codec used and the connection of your video call partner/s, the switch to video call/s can take some seconds and partial pictures can appear.

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Note: We recommend to use the H.264 video.

Note: Please secure that both parties has the same video codec enabled.

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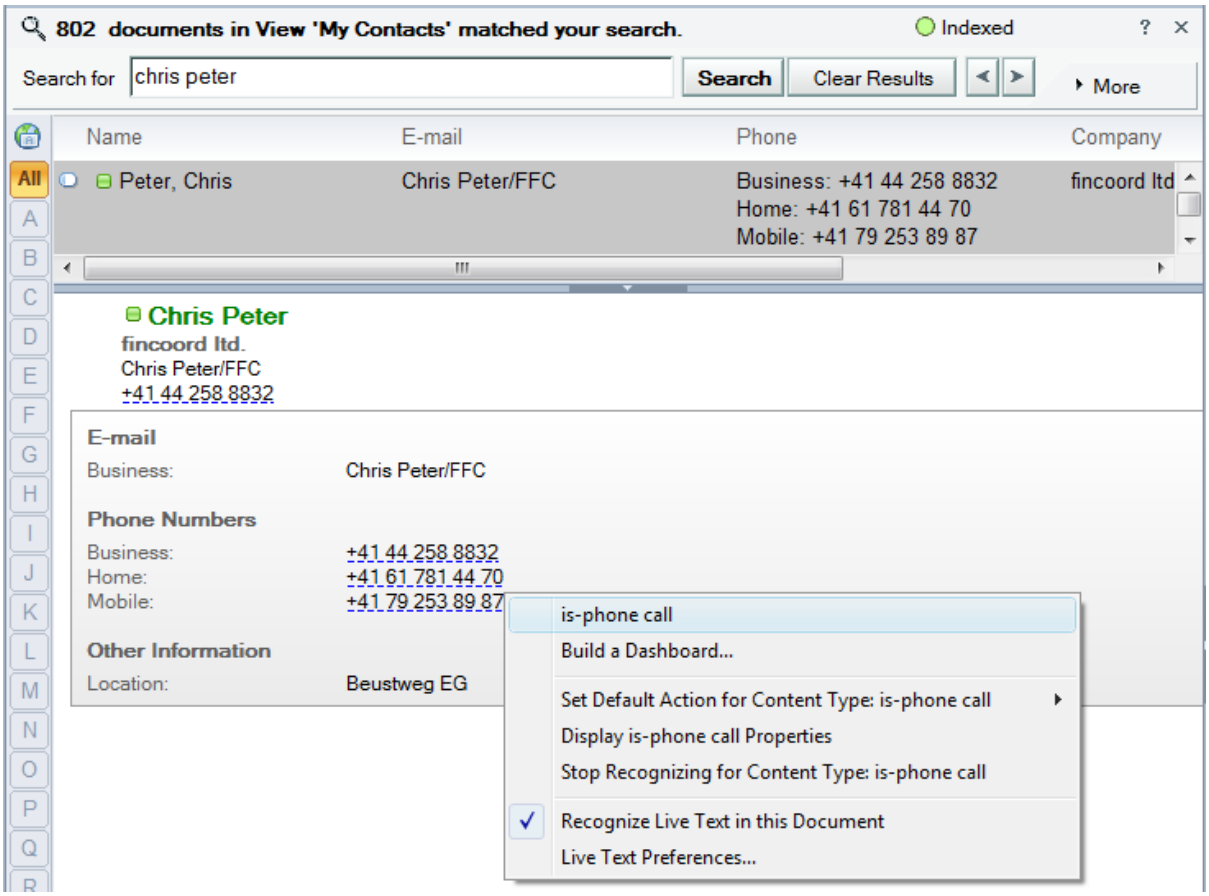
8 Notes, Sametime & Symphony Integration

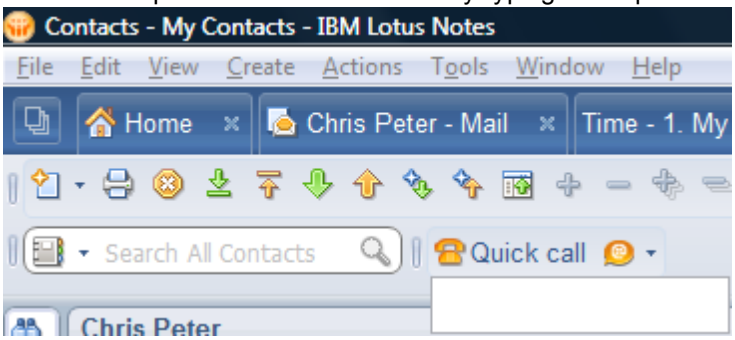
8.1 Notes Integration

is-phone is integrated into IBM Lotus Notes in many ways, enabling calls from everywhere.

- Call out of contact



- Call out of is-phone bar with direct call by typing in the phone number


Contacts - My Contacts - IBM Lotus Notes
File Edit View Create Actions Tools Window Help
Home
Chris Peter - Mail
Time - 1. My
Search All Contacts
Quick call
Chris Peter

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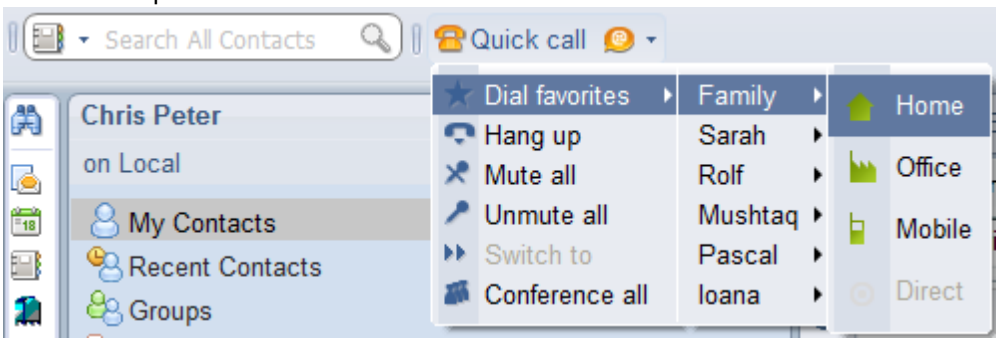
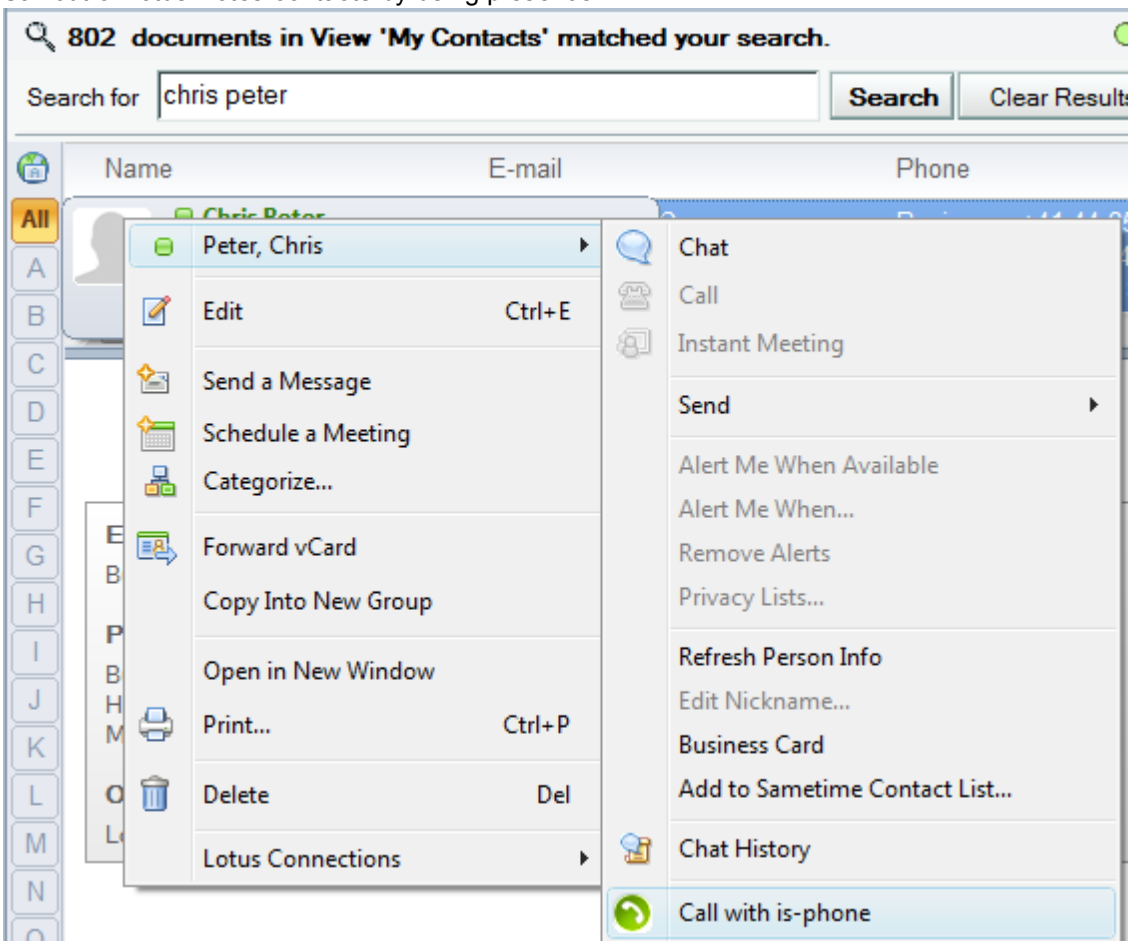
- Call out of is-phone bar with call to favorites



- Call out of Lotus Notes contacts by using presence



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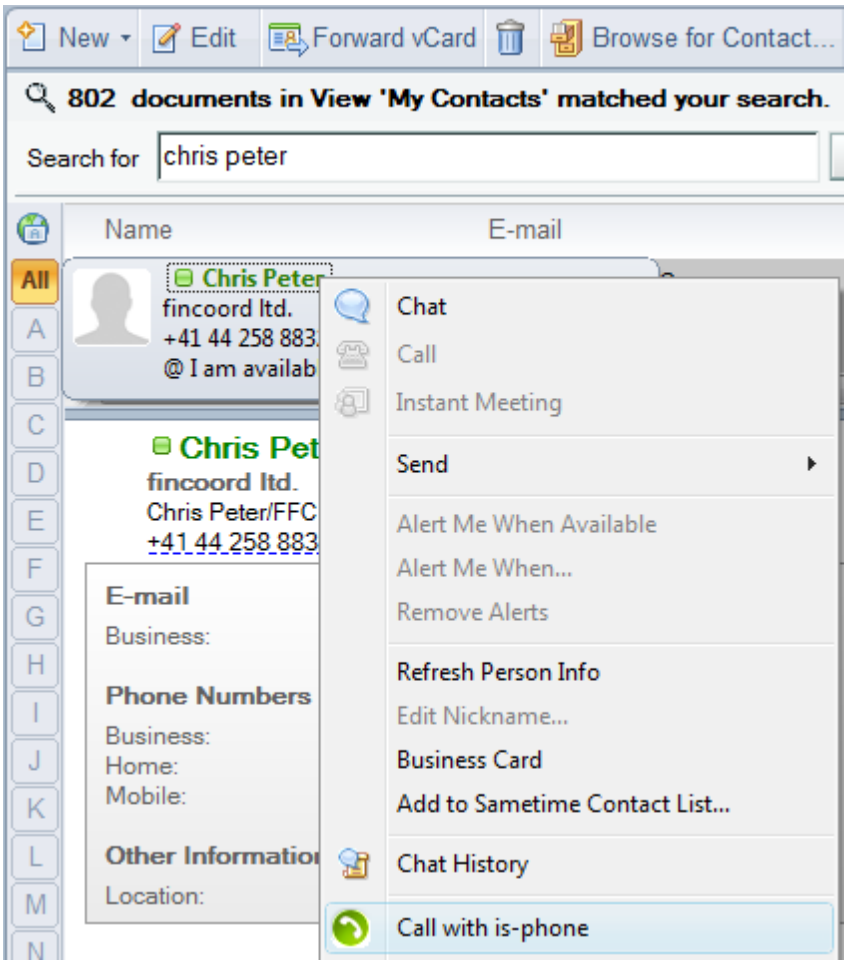

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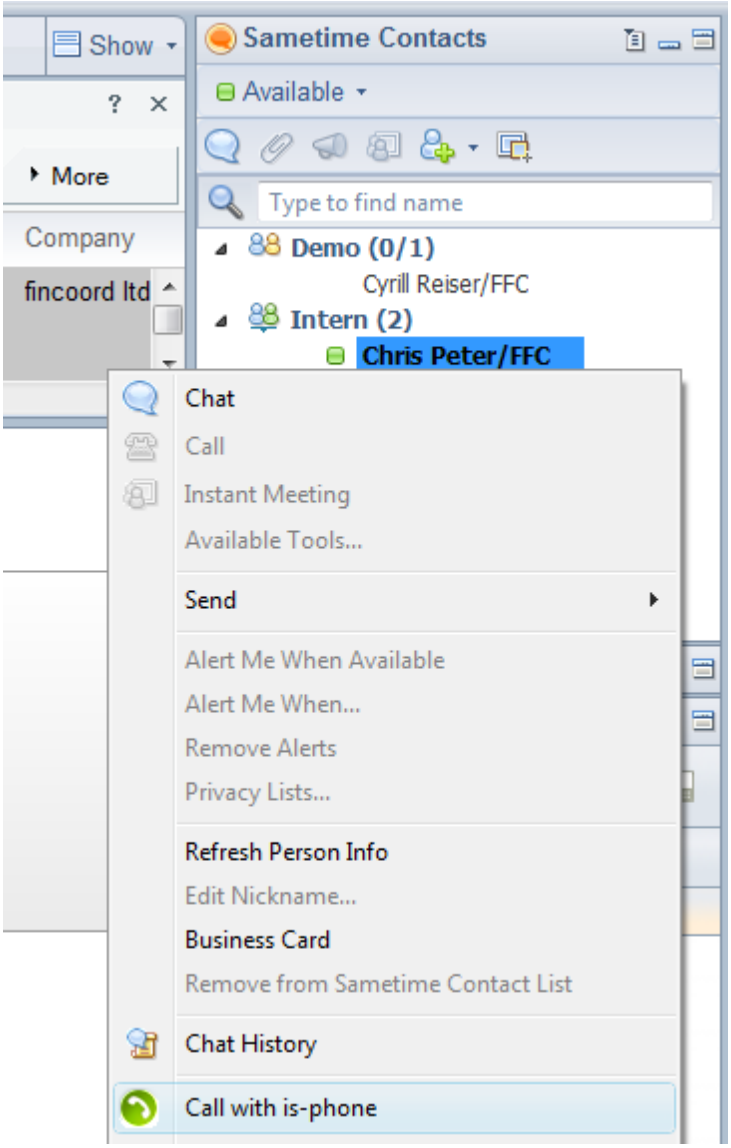
8.2 Sametime Integration

is-phone is integrated into IBM Lotus Sametime.

- Call out of Sametime contact/buddy list by *right mouse click* on the contact's name



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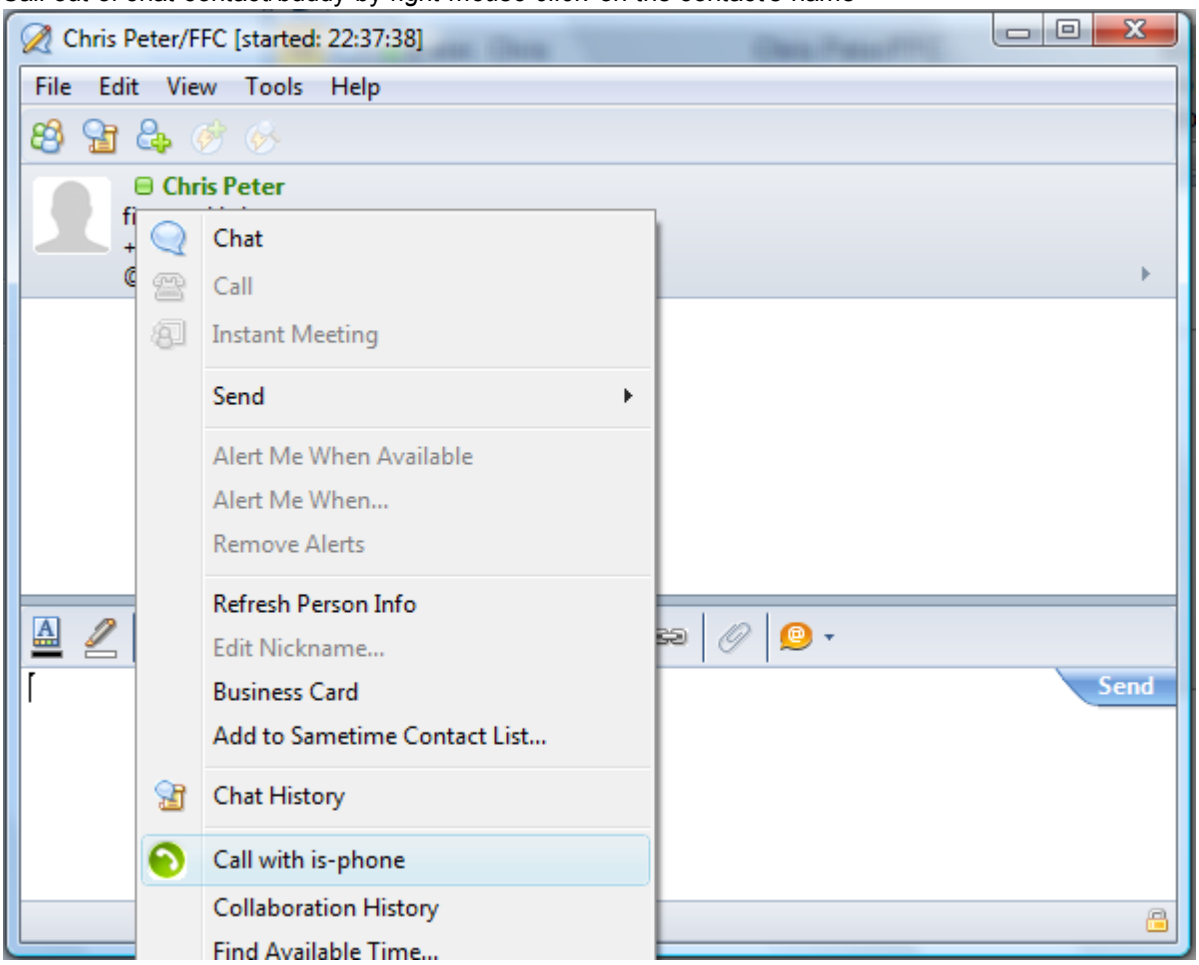
- Call out of chat contact/buddy by *right mouse click* on the contact's name



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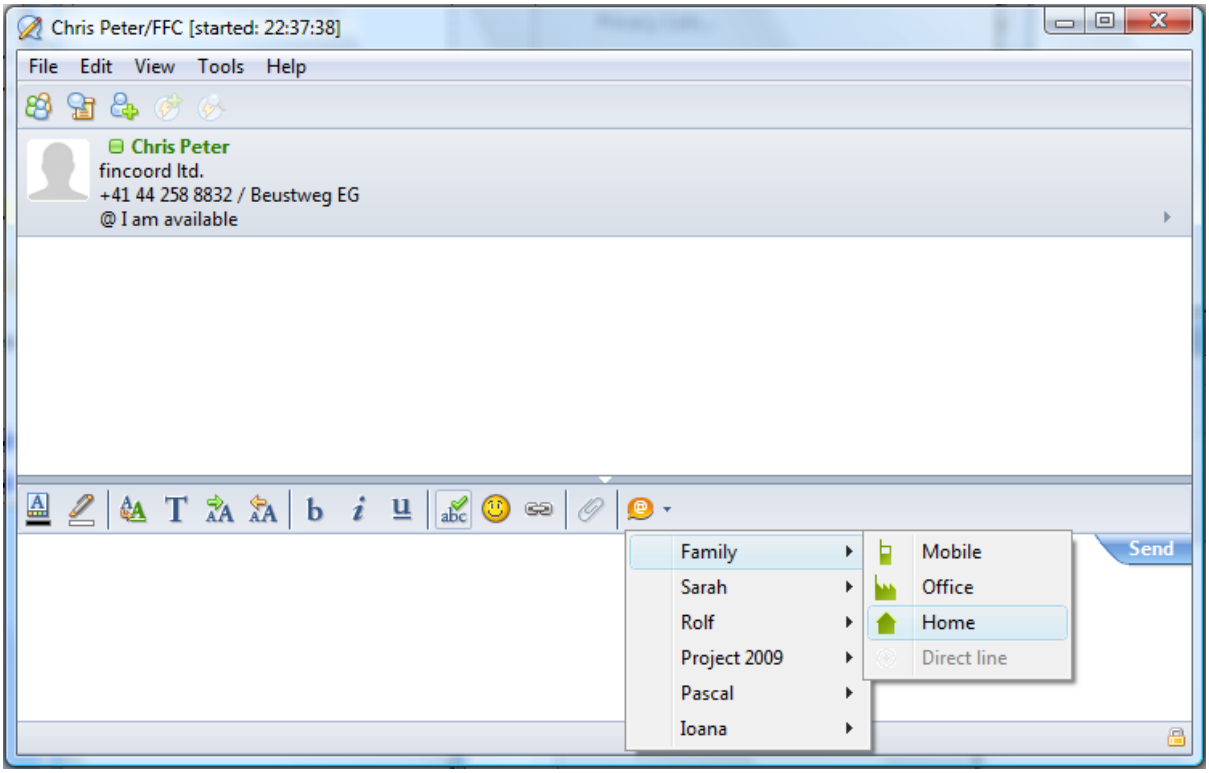
- Call out of chat with contact/buddy by selecting the is-phone logo drop-down and the favorites contact/ number



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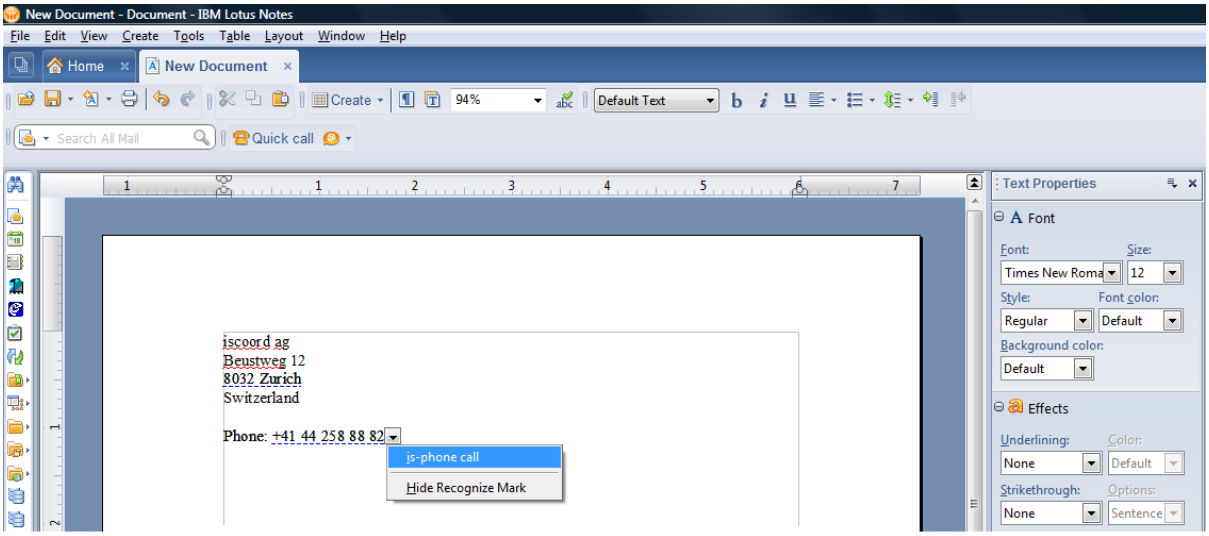
8.3 Symphony Integration

Phone number within Lotus Symphony documents will be underlined (Live Text feature).

- Move your mouse on the number
- Click on the drop down icon on the right
- Select *is-phone call*

This will start a call with is-phone.



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10.1 Audio quality problems

If you have bad audio quality, then please check the audio definitions of your device (Windows Control Panel – Sounds and Audio Devices - Windows Volume Control).

Following settings are important and needs to be adjusted for proper sound quality:

- Volume Control
- Wave
- Microphone
- Line In

Please check if no one of the devices is muted and if they are adjusted accordingly.

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10.2 Audio device problems

Most problems occur due to wrong audio settings and poor voice quality is normally a result of inadequate audio settings.

You can define audio devices for each profile. When you change the profile, the appropriate audio devices will be initialized. If for any reason a defined audio device is not available at that time, is-phone is switching automatically to the default device of the operating system (Control Panel in Windows).

Keep in mind: if you change a profile, the required device will be initialized automatically. If the defined USB handset or headset is not available, the is-phone for IBM Lotus Notes/Sametime Plug-In uses the standard device defined in the operating system (Windows Control Panel).

Note: If you install a new audio device, we recommend running a hardware test which is part of the Windows operating system. Follow these instructions:
Start ' Settings ' Control Panel ' Sounds & Audio Devices ' Voice ' Click on button Test hardware ' follow the Sound Hardware Test Wizard. It helps to improve the audio quality.

Without a USB handset/headset, the is-phone for IBM Lotus Notes/Sametime Plug-In is using the internal sound devices, e.g. speaker/microphone of the PC or notebook. For use in business, we do not recommend working with integrated hardware (echo, quality etc.).

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11 Glossary

Codec	The format by which audio or video streams are compressed for transmission over networks.
CTI	Computer telephony integration - use contacts stored in PC workstation to initiate phone calls.
DTMF	It is used for control purpose, such as the telephone answering machine (also known as “touch-tone”).
IP	Internet Protocol - A data-oriented protocol used for communicating across a network. IP is the most common protocol used on the internet.
IP address	Unique number that devices use to identify each other in an IP-based computer network.
PSTN	Public Switched Telephone Network - The traditional land-line phone network.
Registrar	A registrar is a server in a Session Initiation Protocol (SIP) network which accepts SIP register requests.
RFC	Request for Comment - a document which describes a particular internet technology. RFCs may be a proposals, drafts or full internet standards (IETF standards).
RTP	Real-time Transport Protocol - Protocol for delivering the media portion of a data transmission over an IP network. SRTP is another media protocol.
Signaling	The information in a VoIP call which establishes and controls the connection as well as managing the network. The non-signaling portion of the call is the media.
SIP	Session Initiation Protocol -the signaling protocol which the is-phone for IBM Lotus Notes/Sametime Plug-In follows for phone calls.
SIP account	An account which provides users with the ability to make VoIP phone calls. The account encapsulates the rules users must follow and the telephony functions users can access.
SIP address	The address used to connect to a SIP endpoint (i.e. the “phone number” used in a VoIP phone call). An example would be: sip:josephq@domainabc.com.
Softphone	A softphone enables voice over IP telephone calls from any PC workstation and notebook.
TCP	Transmission Control Protocol - a transport protocol for delivering data over an IP network. Other transport protocols include TLS and UDP.
UDP	User Datagram Protocol - a transport protocol for delivering data over an IP network. Other transport protocols include TCP and TLS.
URL	Uniform Resource Locator – a URL identifies a name or address and indicates the network mechanism used to access the resource.
USB device	Universal Serial Bus - device that follows a specific communications standard (e.g. handset or headset).
VoIP	Voice over Internet Protocol – a variation of IP used for sending voice data over the internet.
VoIP service provider	A business that provides VoIP service, allowing users to make VoIP phone calls using SIP softphones or hard phones (e.g. is-phone for IBM Lotus Notes/ Sametime Plug-In).
Wav	File format standard for storing audio on PC workstations.

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